

Maryland Higher Education Commission

Finance Policy Committee Meeting Agenda

1:30 P.M.

Thursday, May 8, 2003

Maryland Higher Education Commission

839 Bestgate Road, Suite 400

Annapolis, MD 21401

MARYLAND HIGHER EDUCATION COMMISSION

John J. Oliver, Jr., Chairman

Joann A. Boughman

Dorothy Dixon Chaney

Edward O. Clarke, Jr.

Anne Osborn Emery

George S. Malouf, Jr.

Benjamin F. Mason

Emmett Paige, Jr.

Tawan Perry

Donald J. Slowinski, Sr.

Richard P. Streett, Jr.

Mario VillaSanta

**Karen R. Johnson, J.D.
Secretary of Higher Education**

**MARYLAND HIGHER EDUCATION COMMISSION
FINANCE POLICY COMMITTEE**

Richard P. Streett, Jr., Chair

Joann A. Boughman

Donald J. Slowinski, Sr.

George S. Malouf, Jr.

Benjamin F. Mason

**Janice B. Doyle
Assistant Secretary for Finance Policy**

**MARYLAND HIGHER EDUCATION COMMISSION
FINANCE POLICY COMMITTEE**

AGENDA

TIME: 1:30 p.m.
Thursday
May 8, 2003

PLACE: 839 Bestgate Road, Suite 400
Annapolis, MD 21401

	<u>Page</u>	<u>Action Item</u>
Call to Order		
Approval of the March 13, 2003 Minutes.....	1	*
Guideline Revisions for the Community Colleges' Innovative Partnerships for Technology Program	5	*
Guideline Revisions for the Private Donation Incentive Program.....	35	*
Guideline Revisions for Student Financial Assistance Programs	57	*

The Maryland Higher Education Commission is committed to ensuring that individuals with disabilities are able to fully participate in and benefit from the Commission's public meetings, programs, and services. Anyone planning to attend a meeting of the Commission who wishes to receive auxiliary aids, services, or accommodations should contact Susan Taylor at 410-260-4539 or 1-800-735-2258 (TTY/Voice) by Thursday, May 1, 2003.

MARYLAND HIGHER EDUCATION COMMISSION

839 Bestgate Road, Suite 400

Annapolis, Maryland 21401

Finance Policy Committee

Minutes of Meeting

March 13, 2003

The Finance Policy Committee met on Thursday, March 13, 2003. Commission members present were: Dr. Richard P. Streett, Jr., Chair; Dr. George S. Malouf, Jr.; Benjamin F. Mason; and Dr. Donald J. Slowinski, Sr.

Staff members present were: Karen R. Johnson, Secretary; Janice Doyle, Assistant Secretary; Anne Budowski, Assistant Secretary; Dr. John Sabatini, Jr., Assistant Secretary; Pace McConkie, Assistant Attorney General; Dr. Michael Keller; Monica Randall; David Beard; Jeff Cann; Geoffrey Newman; Jody Sprinkle; Cathy Tidwell; and Susan Taylor.

CALL TO ORDER

Commissioner Streett called the Finance Policy Meeting to order at 1:30 p.m.

APPROVAL OF MINUTES

The Commissioners reviewed the Finance Policy Committee meeting minutes from the October 30, 2002, meeting and approved them with no corrections.

FY 2005 CAPITAL BUDGET PRIORITIES

Mr. David Beard, Finance Analyst, explained that the purpose for establishing the capital budget priorities is to provide a uniform framework for making recommendations for funding capital projects for the two-year and the four-year institutions. Referring to the chart on page 9 of the agenda book, he gave details and examples of how the Commission utilizes the priorities when making their recommendations. Mr. Beard stated that the capital budget priorities remain unchanged from the previous year.

Commissioner Malouf moved to approve the FY 2005 Capital Budget Priorities and forward the recommendation to the full Commission. Commissioner Slowinski seconded the motion and the Committee voted unanimously to approve the motion.

REVISED GUIDELINES FOR MARYLAND GEAR UP SCHOLARSHIP PROGRAM

On behalf of Ms. Paula Fitzwater, Ms. Janice Doyle presented the proposed changes to the guidelines for GEAR UP (the Gaining Early Awareness and Readiness for Undergraduate Program). She explained that MHEC originally had federal funds to be used for scholarship money for students who participated in a previous GEAR UP program called NEISP (National Early Intervention Scholarship and Partnership program). Those students were awarded under the original guidelines created by MHEC. Based on that experience, the Commission revised those guidelines to award a new round of funds to students who are in the new federal GEAR UP program. Although, these students are currently in the ninth grade with several years ahead of them, it is important to revise these guidelines and get the information out to the students to prepare them for college.

Ms. Doyle referred the Committee to the agenda book that listed the proposed changes. She detailed one important change, which will cap the amount received by students who attend private or out-of-state institutions. This change will help prevent overspending the scholarship funds in the early years and will allow the Commission to continue to support eligible students in future years. Ms. Doyle stated that all the recommended changes will serve the Commission better when awarding the next round of students under GEAR UP. She asked the Committee members to consider approving the revised guidelines and forward their recommendation to the Commission.

Commissioner Slowinski moved to approve the proposed guidelines. Commissioner Mason seconded the motion and the Committee voted unanimously to forward the recommendations to the full Commission.

SURVEY OF MARYLAND TEACHER SCHOLARSHIP RECIPIENTS

Dr. Michael Keller, Director of Research and Policy Analysis, introduced Ms. Lindsay Albert to the Committee. He stated that Ms. Albert is the principal author of the survey and conducted the survey as an independent study, earning credit toward her Master's degree at the University of Maryland, College Park. Dr. Keller praised Ms. Albert for an outstanding job in conducting the survey and preparing the final report. Additionally, Dr. Keller acknowledged the substantial assistance that he and Ms. Albert received from the Commission's Office of Student Financial Assistance and the Finance Policy Division.

Ms. Albert began her presentation by stating that the purpose of the Maryland teacher scholarships is to provide incentives to increase the number of Maryland citizens who become teachers. She said that the study attempted to determine if the teacher scholarships were effective in meeting this purpose. From the 3,603 surveys mailed, there was a 57 percent participation rate in which 2,015 surveys were returned in time for analysis. Ms. Albert described the results of the survey. One of the most important findings of the survey was that a large majority of current teachers who benefited from the scholarships said that they planned to continue teaching in Maryland schools after their service obligation was fulfilled.

She concluded her presentation describing future recommendations based on the survey results, including administrative changes to reduce the number of students who chose to decline the scholarship offer.

Ms. Karen Johnson offered her thanks to everyone for taking on the project. She said that it is important to have this kind of concrete information to share with members of the General Assembly and the Commission. She added that she appreciated the work that Ms. Albert did on this project and hoped to be able to use this survey as a template to evaluate other State scholarship programs.

The Committee members voted on and agreed that the Commission staff should conduct a similar survey of the recipients of the Nursing Scholarship Program. After some discussion, they further agreed that the Office of Student Financial Assistance should investigate what administrative procedures can be taken to reduce the number of students who turn down teacher scholarships. The Committee voted unanimously in favor of forwarding the recommendations to the full Commission.

COMMUNITY COLLEGE CAPITAL GRANT PROGRAM

Mr. David Beard presented the Community College Capital Grant Program: State and Local Cost-Sharing Formula. He explained the cost-sharing formula is one of two criteria that determine the level of State participation with community college capital projects. The other criterion is a portion of the project that meets the space eligibility requirements. The Maryland State Department of Education calculates the cost-sharing formula based on enrollment of students in elementary and secondary schools and each county's wealth. The State contributes anywhere from 50 to 70 percent of the eligible cost for all locally controlled community colleges and 75 percent to the regional community colleges.

This report was presented for information only.

REPORT ON THE INNOVATIVE PARTNERSHIPS FOR TECHNOLOGY PROGRAM

Ms. Monica Randall presented the report on the Innovative Partnerships for Technology Program. She explained that the community college program provides State-matching funds for cash or non-cash donations that are earmarked for technology. Ms. Randall highlighted portions of the report including a summary of eligible donations received between FY 1999 and FY 2002. During this time, eligible donations totaled \$8.7 million. Due to the State's fiscal situation, the State has matched only \$5.5 million. The remaining \$3.3 million have been deferred. In the Governor's FY 2004 budget allowance, there are no matching funds for this program. Ms. Randall added that during this General Assembly, there has been an introduction of a legislative change to this program to change the timeframe for the State-matching requirement.

This report was presented for information only.

REPORT ON THE PRIVATE DONATION INCENTIVE PROGRAM

Ms. Randall presented the annual report on the Private Donation Incentive Program. She stated that this program provides State-matching funds, not only for the community colleges, but also for the four-year public colleges, as a method to encourage private fund-raising. She described the current status of the program. Between FY 1999 and FY 2002, public institutions have raised \$37.6 million from private sources and they have claimed \$16.5 million in eligible matching funds. The State, unfortunately, has been able to match only \$4.8 million of the \$16.5 million with the remaining \$11.7 million deferred to future years. The Governor's FY 2004 budget allowance provides funds only for the historically black institutions.

Ms Randall concluded the presentation by highlighting the level of fund-raising from the various colleges throughout Maryland indicating which institutions met the maximum State match. She added that as with the Innovative Partnerships for Technology Program, legislation has also been introduced this year to change the timeframe for the State-matching requirement.

This report was presented for information only.

ADJOURNMENT

The Finance Policy Committee meeting was adjourned at 4:07 p.m.



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Robert L. Ehrlich, Jr.
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Karen R. Johnson
Secretary of Higher Education

MEMORANDUM

DATE: May 8, 2003

TO: Finance Policy Committee

FROM: Karen R. Johnson, *[Signature]* STAFF: Monica E. Randall

SUBJECT: Guideline Revisions for the Community Colleges' Innovative Partnerships for Technology Program

The Innovative Partnerships for Technology Program (IPT) provides State-matching funds for donations from the private sector or public foundations for the technology needs of eligible community colleges. Community colleges may receive contributions in the form of cash or non-cash donations. All donations must be earmarked specifically for technology. Contributions earmarked specifically for technology are matched by the State, dollar-for-dollar, up to \$700,000 per eligible institution over the grant period (fiscal 1999 to fiscal 2006).

During the 2003 Maryland Legislative Session, the General Assembly passed legislation that modifies the time frame for the State-matching requirement. Under the Budget Reconciliation and Financing Act of 2003, the State is required to provide a match in the third fiscal year following the eligible donation. This legislative change effectively changes the State's funding obligation by deferring payments for an additional year.

The attached guidelines reflect the legislation passed by the 2003 Maryland General Assembly.

RECOMMENDATION: It is recommended that the Finance Policy Committee approve the guideline revisions for the Community College's Innovative Partnerships for Technology Program and forward the recommendation to the full Commission.

Guidelines for the Community Colleges' Innovative Partnerships For Technology Program

Division of Finance Policy

Approved: November 10, 1998
Revised: April 2003

Guidelines for the Community Colleges' Innovative Partnerships for Technology Program (IPT)

I. Authority

The Innovative Partnerships for Technology Program was enacted into law by the Maryland General Assembly (Annotated Code of Maryland-Education Article Section 16-317) in 2001.

II. Purpose

To provide State-matching funds for donations from the private sector or public foundations for the technology needs of eligible institutions (community college campuses). The State will match an amount up to a maximum of \$300,000 (dollar per dollar) per eligible institution to donations from eligible donors.

III. Program Definitions

A. Eligible Program

Eligible program means any contribution for technology, which does not contain unreasonable restrictions as to use as defined by the Maryland Higher Education Commission.

B. Technology

Technology is defined in the law (Annotated Code of Maryland Education Article Section 16-317 (A)(9)) to mean any hardware, software, communications infrastructure, and associated training and contracted services that enable local or global presentation, exchange, and transmission of information in digital or analog form for teaching, learning, student support services, and administration. The definition of technology includes capital expenditures but does not include staff.

C. Eligible Institutions and Sums

Eligible institutions are the community college campuses enumerated by law and do not include the colleges' affiliated foundations. Designated eligible institutions (community college campuses) that raise contributions up to a maximum of \$150,000 in the first eligible period (FY 2003-FY 2004) in monies and/or equipment from eligible donors above donations received during the base year period (FY 2002; July 1, 2001 through June 30, 2002) specifically for technology will have that amount matched in whole contingent upon the availability of State funds.

Please note: Only if an eligible institution receives voluntary donations of \$150,000 during the first eligible period, will they then qualify to participate in the second eligible period.

The same eligible institutions (community college campuses) are also eligible to raise contributions, for State matching purposes, up to \$150,000 for technology in a second eligible period (FY 2005 – FY 2006) following the same guidelines as the first eligible period.

D. Eligible Donors

Eligible donor means any individual, corporation, partnership, organization, or other business organization, public or private foundation or other nonprofit organization which makes a contribution that is an increase over the amount contributed by the donor during the base year, or a contribution made by a new donor during one or both of the eligible periods. Eligible donor may include a community college's affiliated foundation. Eligible donor does not include a local government, the State, the federal government, or any foreign government.

E. Eligible Contribution

1. An eligible contribution is any monetary or equipment donation specifically designated to benefit one or several eligible institutions received during one or both of the following periods: FY 2003 and FY 2004; and FY 2005 and FY 2006 that exceeds the base year (FY 2002) donation.
2. The eligible contribution must be clearly designated for technology by the donor. Equipment donations must be assessed a fair market monetary value amount.

IV. Program Components

A. Base Year

FY 2002 (July 1, 2001 through June 1, 2002) is the "base year" for comparing eligible donors and donations to the eligible institution during the eligible years when matching funds are requested. The base year comparison should not include contributions made to an eligible institution during the base year by an eligible donor pursuant to legal or contractual obligations of the donor, including contributions from a community college's affiliated foundation for identified scholarship programs.

B. Eligible Periods

1. The first eligible period is FY 2003 (July 1, 2002 through June 30, 2003; and FY 2004 (July 1, 2003 through June 30, 2004).
2. The second eligible period is FY 2005 (July 1, 2004 through June 30, 2005); and FY 2006 (July 1, 2005 through June 30, 2006).

V. Record Keeping, Auditing, and Reporting Requirements

A. Record keeping and Auditing Requirements

1. Eligible institutions must keep a separately identified account of donations received. Additionally, the eligible institutions should maintain records in support of all reports and claims filed for matching State payments.
2. Eligible institutions shall prepare and maintain a comprehensive list of the donations received and pledged amounts for the base year period of July 1, 2001 through June 30, 2002 (FY 2002). Please take note that the donor's names should be clearly delineated to avoid any ambiguities or conflicts. (i.e. John and Mary Smith instead of Mr. and Mrs. Smith). The listing of base year donations should be audited.
3. Eligible institutions receiving State payments under this program shall provide the Maryland Higher Education Commission one copy of its community college annual fiscal year audit and management report within 90 days of the close of each fiscal year. If a community college currently provides the Commission (Division of Finance Policy) with a copy of the annual audit and management report, it is not necessary to submit a second copy.
4. Examples of satisfactory documentation that a donation was for an eligible technology program includes, but is not limited to: deeds of gifts; bequests; testamentary instruments; individual letters from donors or their designees; membership or alumni solicitation mailings; newsletters; public notices regarding contributions; event admission fees; posters or other publicity for fund-raising events; scripts for telethons or for radio, television or telephone solicitations; or other written documentation that is retained by the receiving institution and provides positive evidence of the donor's intent.
5. Eligible institutions should maintain a record of the use of all donations, private and State-matching funds, received for the technology program.
6. Eligible institutions are required to have an "independent auditor" certification form assuring that all monies, the donor's and matching State

funds are used exclusively for technology.

7. All relevant records should be kept through July 1, 2011, or until audited.

B. Reporting Requirements

1. Claims should be submitted to the Maryland Higher Education Commission's Director of Finance Policy in the format requested (see Appendix B) in each of the fiscal years of the two eligible periods.
2. Eligible institutions must submit all required forms for the annual report of donations and pledges and anticipated revenue by the dates specified by the Maryland Higher Education Commission. The report of cash receipts and donations will be due within 120 days of the close of each fiscal year.

VI. State Match

- A. Matching payments from funds appropriated by the State for any fiscal year will be prorated among eligible institutions, which have submitted valid claims of received eligible contributions. Payments shall be made in the third fiscal year following the fiscal year during which the contributions are made. Examples shown below:

1. Eligible contributions received in FY 2003 and reported to the Commission in FY 2004, will be State-Matched in FY 2005~~6~~
2. Eligible contributions received in FY 2004 and reported to the Commission in FY 2005, will be State-Matched in FY 2006~~7~~.
3. Eligible contributions received in FY 2005 and reported to the Commission in FY 2006, will be State-Matched in FY 2007~~8~~.
4. Eligible contributions received in FY 2006 and reported to the Commission in FY 2007, will be State-Matched in FY 2008~~9~~.

VII. Guidance

- A. The Commission's Director of Finance Policy is authorized to provide, upon written request, guidance on any issue arising from the administration of this program.
- B. Eligible institutions may appeal the Director's guidance determinations to the Secretary of Higher Education. All appeals must be submitted in writing within thirty (30) days to the Director of Finance Policy and contain detailed reasons that would justify reversal of the original decision, including all appropriate documentation. The Secretary will review each appeal and make a decision within sixty (60) days after receiving the appeal. Written notification will be provided. All decisions of the Secretary are final.

**Maryland Higher Education Commission's
Innovative Partnerships for Technology Program (IPT)
State-Matching Share**

Eligible Institution	Community College Affiliation	Period I FY 2003- 2004	Period II FY 2005- 2006	Maximum State Share
Allegany	Allegany College of Maryland	\$150,000	\$150,000	\$300,000
Anne Arundel	Anne Arundel Community College	150,000	150,000	300,000
Baltimore City	Baltimore City Community College	150,000	150,000	300,000
La Plata	College of Southern Maryland	150,000	150,000	300,000
Leonardtown	College of Southern Maryland	150,000	150,000	300,000
Prince Frederick	College of Southern Maryland	150,000	150,000	300,000
Carroll	Carroll Community College	150,000	150,000	300,000
Catonsville	Community Colleges of Baltimore Co.	150,000	150,000	300,000
Dundalk	Community Colleges of Baltimore Co.	150,000	150,000	300,000
Essex	Community Colleges of Baltimore Co.	150,000	150,000	300,000
Cecil	Cecil Community College	150,000	150,000	300,000
Chesapeake	Chesapeake College	150,000	150,000	300,000
Frederick	Frederick Community College	150,000	150,000	300,000
Garrett	Garrett Community College	150,000	150,000	300,000
Hagerstown	Hagerstown Community College	150,000	150,000	300,000
Harford	Harford Community College	150,000	150,000	300,000
Howard	Howard Community College	150,000	150,000	300,000
Germantown	Montgomery College	150,000	150,000	300,000
Rockville	Montgomery College	150,000	150,000	300,000
Takoma Park	Montgomery College	150,000	150,000	300,000
Prince George's	Prince George's Community College	150,000	150,000	300,000
Wor-Wic	Wor-Wic Community College	150,000	150,000	300,000
Net Totals		\$3,300,000	\$3,300,000	\$6,600,000

Note: In order to qualify for and participate in Period II State-matching funds, each eligible institution must meet the maximum donation goals of Period I.

Maryland Higher Education Commission
Guidelines for the Community Colleges'
Innovative Partnership for Technology (IPT) Program

Frequently asked Questions (Q) and Answers (A)

Technology:

- Q. 1 Must the State's matching funds be used exclusively for technology as defined in the law and guidelines?
- A. 1 Yes, all monies, the donor's and State funds, must be used exclusively for technology.
- Q. 2 Are there examples of what is considered to be "technology"?
- A. 2 Technology needs generally cover instructional and administrative technology, intercampus networks and distance learning initiatives, technology support and campus technology infrastructure. For purposes of instructional, administrative, and research initiatives, institutions are looking toward expanded data networks and integrated networks for voice, video and data transmission. Institutions are creating intercampus links, synchronous transmission and enhancing traditional classrooms for multimedia applications and distributed learning or hyper learning models (stations for connections to Internet, databases, use of commercial products, etc.).

Some technology examples include:

Hardware/infrastructure/services: personal computers; T1 and ISDN lines; wiring; construction and renovation of classrooms for interactive or Internet connections; Codecs; whiteboards; faxes; video monitors and cameras; appropriate furniture; acoustics; compressed video equipment; desktop video conferencing equipment; telecommuting facilities; video production equipment; satellite/microwave downlink and uplink equipment; digital satellite upgrades; studio broadcast facilities; PBX systems; local area networks; and conduits to connect buildings.

Software/services: digitizing library resources; purchase of digital databases and the array of educational/administrative software; and online services (registration conversion, aid awards, tutoring, help desk, etc.).

Training/development: conversion to computerized assessments; course development for online courses and/or other distance delivery (video, interactive, combinations); faculty/staff training in use of Internet; interactive classrooms; multimedia; video production; faculty training in instructional design and curriculum design for the student-centered distributed learning environment.

- Q. 3 Can any piece or pieces of equipment be considered “technology”?
- A. 3 The equipment must be in the possession of the eligible institution and comport to the definition of technology as noted in the law (Education Article, 16-317 (A)(9), Annotated Code of Maryland). Eligible institutions should consult the Director of Finance Policy, Maryland Higher Education Commission, if an issue arises.
- Q. 4 What are the parameters of a capital expenditure?
- A. 4 Capital expenditures result in the acquisition of capital assets. A capital asset is defined as “any physical resource that benefits a program for more than one year,” and includes expenditures for land, buildings, improvements, equipment, and library books.
- Q. 5 If a donor determines a piece of equipment to be “technology” and it does not fall within the guidelines for this program, can it still be included as a bona fide contribution?
- A. 5 No, the equipment must meet the guidelines established by the Commission.

Eligible Periods:

- Q. 6 When is an eligible contribution considered received?
- A. 6 Any eligible contribution is considered received when the eligible institution has fiduciary or physical control of the asset. When received, it must be included in the report for the eligible period.
- Q. 7 At what point in time is the contribution considered made to the College?
- A. 7 The contribution is considered received and eligible when the eligible institution has control of the asset.
- Q. 8 Are carry-overs from the first eligible period to the second eligible period permitted?
- A. 8 No, the date a contribution is received governs. Pledges may be made to cover both eligible periods, but the actual date a donation is received governs the matching by the State.
- Q. 9 If an eligible institution fails to generate the entire \$150,000 in the first eligible period, will it receive a match for the amount generated?
- A. 9 Yes, the amount of eligible contributions received will be matched contingent on the availability of appropriated funds. The institution will not be eligible, however, for any matching funds during the second eligible period.

Q.10 If an eligible institution receives money or equipment in support of this program after the second eligible period has passed, can those assets be applied retroactively for a State match?

A. 10 No, all eligible contributions must be received within the eligible time frames noted in the guidelines.

Eligible Donor:

Q.11 If a foundation contributed money to a community college campus during the base year in order to pay for scholarship programs, should the amount of that contribution be included in the base year comparison?

A.11 The base year comparison should not include the foundation's base year contributions pursuant to its already existing legal or contractual obligations. This would include contributions the foundation was obligated to make to the community college campus for identified scholarship programs.

Q.12 If a foundation receives a contribution that is intended by the donor to be used to establish or contribute to a "technology endowment" for a community college, will State matching funds be provided under the IPT program?

A.12 The State will only match contributions received by a community college campus, not its affiliated foundation. To qualify for matching funds, the foundation must make a contribution to the community college campus, communicating to the college the original donor's intent. Consistent with Education Article, section 15-104(a)(1), Annotated Code of Maryland, the college should honor the original donor's intent by using the funds to establish a "technology endowment." This may be accomplished through the foundation so long as the provisions of Education Article, section 15-104(b)(4), Annotated Code of Maryland, are satisfied ("No funds shall be accepted from an affiliated foundation by a public institution of postsecondary education unless the fiscal affairs of the affiliated foundation are audited annually by an independent certified public accountant").

Q.13 Will community college foundations receive State-matching payments for contributions received?

A.13 No, only eligible institutions (community college campuses) may receive matching State payments.

Q.14 Can community college foundations accept contributions for the IPT program?

A.14 Yes, however, the foundation must transfer the contribution to the "eligible institution" during the "eligible period." A foundation is then treated as the donor. The amount eligible for State-matching is determined by comparison to the base year contribution of the foundation.

- Q.15 If funds are given to the College's Foundation, with appropriate instructions to use these funds for technology, is it considered a gift from the foundation or the original donor?
- A.15 When the funds are transferred to the institution by the foundation, the foundation is considered the donor. The foundation must specify that the donation be used for technology, consistent with the original donor's intent.
- Q.16 Can a donation be made to more than one eligible institution of the same community college?
- A.16 Yes, a donation can be made to more than one eligible institution (community college campus) as long as the donor specifically notes it is for a particular campus and designates the gift for technology.
- Q.17 A donor has contributed \$150,000 during one of the eligible periods, but has not specifically designated it for technology or for an eligible institution (community college campus), can it be applied by the eligible institution's administration to the technology program?
- A.17 Yes, the institution may declare the gift be used specifically for technology. To qualify for matching funds, however, the contribution must be designated for technology by the donor.
- Q.18 If an undesignated contribution is received, does the institution have a responsibility to contact the donor and receive a designation that the contribution is for technology under this program?
- A.18 Yes, the institution should request the donor specifically designate the gift for technology.
- Q.19 What if it's impossible to obtain a designation from the donor (i.e., gift from an estate or charitable contribution campaign)?
- A.19 The eligible institution may then designate the gift for the technology program.
- Q.20 Can general contributions received by the institution be designated for the IPT program?
- A.20 Yes, the institution may specify that such contributions may be designated to benefit the IPT program. For example, funds received from the United Charities campaign may be applied to the IPT program by the eligible institution. General contribution refers to any gift that may be received as a result of an open campaign to encourage support of an institution. The example given was the check off system used in the annual statewide charities campaign, whereby a donor just selects one or more charities that he/she wants their donation sent to, without a particular use of the funds specified.
- Q.21 Can an eligible donor make more than one contribution during an eligible period?

A.21 Yes, donors may contribute as often as they choose.

Eligible Contribution Amounts:

Q.22 Must an eligible institution receive the entire \$150,000 in the first eligibility period in order to participate in the second eligibility period for matching State payments?

A.22 Yes, the entire \$150,000 of eligible contributions must be received by the eligible institution in the first eligible period to qualify to participate in the second eligible period for another \$150,000 match.

Q.23 Are base year comparisons necessary in the second eligible period?

A.23 Yes, each donation must be compared to the base year record, and only amounts in excess of the base year donation qualify for the IPT program if they are designated for technology.

Q.24 How much of a gift of \$150,000 from a donor whose base year contribution was \$100,000 is applicable to this program?

A.24 \$50,000 is the eligible contribution for this program since the first \$100,000 equals the base year amount. The entire donation must be designated for technology.

Q.25 If a donor whose base year contribution is \$100,000 donates another \$100,000 specifically designated for technology, is that amount eligible for this program?

A.25 No, the amount although designated for technology, is not in excess of the donor's base year contribution.

Q.26 A donor contributes \$160,000 for technology in the first eligible period; he had contributed \$100,000 during the base year, \$25,000 of which was in fulfillment of a prior year pledge, how much is the eligible contribution amount?

A.26 \$85,000 is the eligible contribution that can be claimed as matching because:

(\$100,000)	Base year payment
<u>25,000</u>	Prior year pledge fulfillment
(\$ 75,000)	Base year contribution
<u>\$ 160,000</u>	Donation during eligibility period
\$ 85,000	Amount that can be claimed for State-matching

Q.27 If an institution receives \$300,000 from a new donor on June 30, 2003 what amounts can be used as an eligible contribution in the first and second periods?

A.27 The eligible contribution for the first eligible period would be \$300,000; however, the State will only match up to the first \$150,000 received. There is no eligible contribution

amount, \$0, for the second eligibility period, the funds were not received during the specified time frame. There is no provision for carryover of excess donations from one eligibility period to the other.

Q.28 Can a donor who contributed to the foundation in the base year, FY 2002, contribute directly to the institution during the eligible period, and be considered a new donor? For example, Mr. Jones gave \$1,000 to the foundation in FY 2002 and nothing directly to the community college in FY 2002; then in FY 2003 Mr. Jones gave \$1,000 to the community college for the technology program, would that be considered an eligible contribution?

A.28 Yes, the donor contributing directly to the community college for the first time in FY 2003 would be considered a new donor. In the example, \$1,000 would be treated as an eligible contribution for State-matching. Note, if Mr. Jones had given the \$1,000 to the foundation in FY 2002, it would not represent an increase over the base year amount; therefore, it would not be an eligible contribution amount (zero).

Deferred Gifts and Non-Cash Contributions:

Q.29 Can personal services be considered a donation eligible for State-matching? For example, a company provides technology equipment and personnel to install, maintain and train staff on usage.

A.29 No, only monetary and equipment donations that can be assessed a value can be considered an eligible contribution for the technology program. Personal services are not eligible for State-matching.

Q.30 Are deferred gifts covered by the legislation?

A.30 There is no reference to deferred gifts in the law. Eligible institutions should have control of the asset during the eligible period for it to be considered as an eligible contribution for this program.

Q.31 How are Non-Cash Contributions valued?

A.31 Non-cash contributions are valued at the amount, which is tax deductible per Internal Revenue Service regulations in force at the time of the donation. Under current provisions of the IRS Code, corporations that do not produce computer equipment may generally take a deduction equal only to their adjusted tax basis in the donated equipment. Institutions would also use that same amount as the value of received equipment. Eligible institutions should keep records of all valuations and the name and addresses of the evaluators and appraisers.

Q.32 Can an institution refuse a donation for the IPT program?

A.32 Yes, if an eligible institution determines that the cost to obtain a valuation of a gift or to maintain a gift is too costly, the donation may be refused, no State-matching funds will

be received. Alternately, the institution may accept the donation and elect not to report it for the purpose of securing matching funds.

Q.33 If a corporate donor reduces the price of data processing equipment as a contribution to the college technology program, can that difference be treated as an eligible contribution? For example, the sale of 100 new computers was quoted to be \$75,000, but as a technology program contribution the corporation only requires payment of \$25,000, will the \$50,000 be eligible for State-matching. The corporate donor had never made a contribution or sales price reduction to the institution before.

A.33 Yes, the amount of \$50,000 could be treated as an eligible contribution. Written documentation from the corporate donor should be on file at the institution to support the donation and transaction.

Q.34 In FY 02 a corporation donated \$10,000 in cash to a community college, and in FY 2003 it provided the college with a gift of 10 new Pentium computers. The fair market value of the computers is \$25,000, can this be treated as an eligible contribution?

A. 34 Yes, the amount of the eligible contribution would be \$15,000, the increase amount over the base year donation. Written documentation must be obtained of the fair market value of the donation and the condition, new, of the gift. The value of a non-cash contribution should be verified during the annual audit.

Q.35 If a company is discarding used equipment, can it be considered an eligible contribution?

A.35 Possibly, if an independent appraisal can be made of the equipment and the value exceeds the base year contribution amount of the donor. Equipment received should be in good condition and not require extensive modifications and upgrades to be useable by the institution. Extreme caution should be used by the institution in accepting used equipment that may cost more to upgrade and maintain than the purchase of new equipment. Also, the equipment should have a useful life comparable with other like assets of the company. The written independent appraisal value should be on file and available for audit. The Orion Computer Blue Book may be used to obtain a value for some computers.

Penalties:

Q.36 Will an eligible institution be penalized if it fails to submit the required reports in a timely manner?

A. 36 Yes, reports must be filed in accordance with dates requested by MHEC to be considered for State-matching.

Appendix A

Form B-1

Date Due: Draft Due July 15

Final Due October 31

Maryland Higher Education Commission
Community Colleges' Innovative Partnerships for Technology Program

Donations

FY 20__

Period July 1, 20__ through June 30, 20__

Eligible Institution: _____

Total Amount Received: _____

Received the following donations designated for technology

Donor	Pledge Amount	Cash Received	Equipment ¹	Other	Total
Individuals					

Private Sector

Foundations

Other

Total

¹ Indicate Appraiser – (A) Donor, (B) College, or (C) Independent Evaluator

We certify that the information presented above is correct:

Chief Development Officer, Signature	Typed Name	Date
--------------------------------------	------------	------

Chief Financial Officer, Signature	Typed Name	Date
------------------------------------	------------	------

Contact for questions:	Name	Title	Phone	Mail
------------------------	------	-------	-------	------

Form B-2
Date Due: Draft Due July 15
Final Due October 31

Maryland Higher Education Commission
Community Colleges' Innovative Partnerships for Technology Program

Foundation Transfer Form
FY 20____
Period July 1, 20____ through June 30, 20____

The following amounts were transferred from the foundation of _____
Community College specifically for advancing technology initiatives of _____

Eligible Institution: _____

Category	Amount	Date
----------	--------	------

Cash:

Equipment (list):

Other:

Total: \$ _____

\$ _____ was given to the _____ during the period _____
(Amount) (Eligible Institution) (Base Year)

We certify that the information presented above is correct:

Institution Chief Development Officer, Signature	Typed Name	Date
--	------------	------

Institution Chief Financial Officer, Signature	Typed Name	Date
--	------------	------

Foundation Chief Financial Officer, Signature	Typed Name	Date
---	------------	------

Form B-3
Date Due: Draft Due July 15
Final Due October 31

Maryland Higher Education Commission
Community Colleges' Innovative Partnerships for Technology Program

Projection of Pledges
FY 20____
Period July 1, 20____ through June 30, 20____

Eligible Institution _____ projects monetary and equipment pledges of \$ _____

We estimated the following:

Number of Donors	Prior Year Pledges Uncollected	Current Year Pledges Uncollected	Equipment	Other	Total
---------------------	--------------------------------------	--	-----------	-------	-------

(Use additional sheets if necessary)

We certify that the information presented above is correct:

Chief Development Officer, Signature Typed Name Date

Chief Financial Officer, Signature Typed Name Date

Form B-4
Date Due: Draft Due July 15
Final Due October 31

Maryland Higher Education Commission
Community Colleges' Innovative Partnerships for Technology Program

Technology Program Expenditures
FY 20____
Period July 1, 20____ through June 30, 20____

The following expenditures were made with funds (public, private, local and State) received in support of the technology program at _____.

Eligible Institution

Equipment	\$ _____
Student Support	\$ _____
Capital Expenses	\$ _____
Other	\$ _____
Total	\$ _____

Note: A computer generated printout maybe attached to support amounts.

We certify that the information presented above is correct.

Chief Development Officer, Signature	Typed Name	Date
--------------------------------------	------------	------

Chief Financial Officer, Signature	Typed Name	Date
------------------------------------	------------	------

Form B-5
Date Due: Draft Due July 15
Final Due October 31

Maryland Higher Education Commission
Community Colleges' Innovative Partnerships for Technology Program

Independent Certification Form

Institution: _____

Eligible donations and State-matching funds must be kept in a separately identified account.

	FY 1999	FY 2000	FY 2001	FY 2002	FY 2003	FY 2004	FY 2005
--	---------	---------	---------	---------	---------	---------	---------

Donor Funds

State-Matching
Funds

“Eligible donations and matching State payments have been placed in a separately identified account and its use is restricted solely for technology expenditures as specified by the Maryland Higher Education Commission.”

The above information regarding donations and grant receipts agrees with records of (State Institution or Foundation): _____

If it does not, please note any exceptions below:

Independent Auditor

Typed Name

Date



MHEC

Creating a state of achievement

Robert L. Ehrlich, Jr.
Governor

Michael S. Steele
Lt. Governor

John J. Oliver, Jr.
Chairman

Karen R. Johnson
Secretary of Higher Education

MEMORANDUM

DATE: May 8, 2003

TO: Finance Policy Committee

FROM: Karen R. Johnson, *[Signature]* STAFF: Monica E. Randall

SUBJECT: Guideline Revisions for the Private Donation Incentive Program

The Private Donation Incentive Program (PDIP) provides State-matching funds to promote private fund-raising within Maryland's public colleges and universities and to encourage public institutions of higher education to increase the public's level of gifts and donations to the institution's endowments. First created by the General Assembly in 1990 for a seven-year period, the State provided matching funds for donations made to the endowments of public institutions and their affiliated foundations.

During the 2003 Maryland Legislative Session, the General Assembly passed legislation that modifies the time frame for the State-matching requirement. Under the Budget Reconciliation and Financing Act of 2003, the State is required to make payments to the Historically Black Institutions in the fiscal year following the eligible donation. For all other eligible institutions, the State is required to make payments in equal installments between fiscal 2005 and fiscal 2008.

The attached guidelines reflect the legislation passed by the 2003 Maryland General Assembly.

RECOMMENDATION: It is recommended that the Finance Policy Committee approve the guideline revisions for the Private Donations Incentive Program and forward the recommendation to the full Commission.

Guidelines for the Private Donation Incentive Program

Finance Policy

Approved: November 10, 1998
Revised: April 2003

GUIDELINES FOR THE PRIVATE DONATION INCENTIVE PROGRAM

A. AUTHORITY

Education Article, Title 17 (Financial Aid to Institutions of Higher Education), Subtitle 3 (Private Donation Incentive Program), Section 17-301. Annotated Code of Maryland.

B. PURPOSE

To encourage public institutions of higher education to increase the level of private contributions to their endowments, the State will match eligible contributions from eligible donors to public institutions of higher education or their affiliated foundations.

C. ELIGIBLE INSTITUTIONS AND MAXIMUM STATE-MATCHING FUNDS

The following is the list of institutions eligible to participate in this program and the maximum State-matching funds for which they are eligible during the lifetime of the Private Donation Incentive Program.

<i>Community College Campuses</i>	
Allegany College of Maryland	\$ 250,000
Anne Arundel Community College	\$ 250,000
Baltimore City Community College	\$ 250,000
Carroll Community College	\$ 250,000
Cecil Community College	\$ 250,000
Chesapeake College	\$ 250,000
College of Southern Maryland:	
Calvert Campus	\$ 250,000
Charles Campus	\$ 250,000
St. Mary's Campus	\$ 250,000
Community Colleges of Baltimore County:	
Catonsville Campus	\$ 250,000
Dundalk Campus	\$ 250,000
Essex Campus	\$ 250,000
Frederick Community College	\$ 250,000
Garrett College	\$ 250,000
Hagerstown Community College	\$ 250,000
Harford Community College	\$ 250,000
Howard Community College	\$ 250,000
Montgomery College:	
Germantown Campus	\$ 250,000
Rockville Campus	\$ 250,000
Takoma Park Campus	\$ 250,000
Prince George's Community College	\$ 250,000
Wor-Wic Community College	\$ 250,000

HBCU's

Bowie State University	\$ 1,500,000
Coppin State College	\$ 1,500,000
Morgan State University	\$ 1,500,000
University of Maryland Eastern Shore	\$ 1,500,000

Four-Year Institutions

Frostburg State University	\$ 750,000
Salisbury University	\$ 750,000
St. Mary's College of Maryland	\$ 750,000
Towson University	\$ 750,000
University of Baltimore	\$ 750,000
University of Maryland University College	\$ 750,000

Research Institutions

University of Maryland, Baltimore	\$ 1,250,000
University of Maryland Baltimore County	\$ 1,250,000
University of Maryland, College Park	<u>\$ 1,250,000</u>

Total Maximum State Matching

\$19,750,000

D. MATCHING RATIOS

1. For the first \$250,000, or any portion thereof, the State will provide one dollar for each dollar donated.
2. For the next \$1,000,000, or any portion thereof, the State will provide one dollar for every two dollars donated.
3. For the next \$1,500,000, or any portion thereof, the State will provide one dollar for every three dollars donated.
4. Starting July 1, 2001, the matching formula changed for the named HBCU's. For donations made to the HBCU's after July 1, 2001, the State will match the first \$250,000 on a 2:1 basis and the next \$ 1 million, on a 1:1 basis.
5. No eligible institution shall receive more than the maximum prescribed in Section C.

E. DEFINITIONS

1. **Affiliated Foundation.** A foundation is eligible to receive contributions under this specific program if:
 - a. It is an affiliated foundation within the meaning of that term in Section 15-104 of the Education Article of the Annotated Code of Maryland;
 - b. It has been approved by the appropriate governing board to be operated as an affiliated foundation; and

- c. Its fiscal affairs are audited annually by an independent certified public accountant.

If a foundation is affiliated with more than one eligible institution, it should segregate contributions received under this program into endowments dedicated to the specific eligible institution for which the contribution was designated.

- 2. **Eligible Donor.** An eligible donor is any individual, corporation, partnership, or other form of business organization, public or private foundation (other than those eligible to participate in this program), or other nonprofit organization. Eligible donors do not include the State, any of its subdivisions, the federal government or any foreign government.
- 3. **Eligible Contribution.** An eligible contribution is:
 - a. Specifically designated as an endowment from an eligible donor for an eligible program.
 - b. Specifically designated to benefit one eligible institution.
 - c. Pledged during the period July 1, 1998 through June 30, 2004 and **paid** prior to July 1, 2004.
 - d. May be used for only one matching State program.
- 4. **Endowment.** An endowment is any contribution or gift that has been provided under the condition that the principal remain intact and be invested in perpetuity for the purpose of producing income.
- 5. **Eligible Program.** An eligible program is any endowment for an academic purpose, which does not contain unreasonable restrictions as to use. The endowment should support activities consistent with the accepted role and approved mission of the institution. Priority should be given to seeking endowment contributions, which enhance the primary functions of the institution, i.e., instruction, research, and public service, including scholarships for students. Please note that an eligible program does not include any endowment that supports intercollegiate athletic programs.

F. BASE YEAR

- 1. The base year period begins in July 1, 1997 and ends June 30, 1998 (fiscal year 1998). Payments made during the base year fulfilling pledges made prior to July 1, 1997 are not included in the determination of the amount donated during the base year.
- 2. Eligible institutions and their affiliated foundations shall prepare and maintain for audit purposes a comprehensive list of contributors and the amounts contributed by each for the period of July 1, 1997 through June 30, 1998, the base year.

G. AMOUNT ELIGIBLE FOR STATE MATCH

Subject to the limitations prescribed in Sections C. and D., and if all other criteria are met, the State will match:

1. The full amount contributed by a donor who did not contribute to the institution, its affiliated foundation(s) or its endowment(s) during the base year; July 1, 1997 - June 30, 1998.
2. The increase in the amount given by a donor over the amount given by the donor to the institution, its affiliated foundation(s) or its endowment(s) during the base year, July 1, 1997 - June 30, 1998.

H. NON-CASH CONTRIBUTIONS AND DEFERRED GIFTS

Non-cash contributions will be valued at the amount which is tax-deductible as determined in accordance to the Internal Revenue Service Regulations. A deferred gift wherein actual funds may not be received for many years, may be eligible (to the extent that it meets the stipulations set forth in E. and G.), if the institution receiving the gift (or its affiliated foundation) has control of the asset. Payment must be received by June 30, 2004.

I. RECORD KEEPING AND AUDIT REQUIREMENTS

Satisfactory documentation that a donation was for an endowment and to a particular institution includes but is not limited to: deeds of gifts; bequests; testamentary instruments; individual letters from donors or their designees; membership or alumni solicitation mailings; newsletters; public notices regarding contributions, admission fees, or gift shop sales; posters or other publicity for fund-raising events; scripts for telethons or for radio, television or telephone solicitations; or other written documentation that is retained by the receiving institution and provides positive evidence of donative's intent. Eligible institutions and affiliated foundations receiving State payments under this program shall provide the Maryland Higher Education Commission two copies of an annual audit of all **disbursements**, pledged and paid amounts and sources. The Commission will provide one copy of the annual audit to the Legislative Auditor. The Commission must receive an annual independent certification as to the eligibility of claimed donations. This statement may be included within the audit report.

J. PROCEDURES FOR CLAIMING STATE-MATCHING FUNDS

Claims may be submitted annually to the Secretary of Higher Education by the president of an eligible institution. The Maryland Higher Education Commission must receive claims for contributions received during any fiscal year by November 1 of the following fiscal year. Funds appropriated for this program for any fiscal year will be prorated proportionally among eligible institutions that have submitted valid claims of paid eligible contributions.

K. PAYMENTS

Amounts paid by the State under this program shall be made in accordance with Section 17-302(c) of the Education Article. For Bowie State University, Coppin State College, Morgan State University, and the University of Maryland Eastern Shore, payments shall be made in the fiscal year following the fiscal year during which the contributions are made. For all other eligible institutions, the State will make payments in equal installments between fiscal 2005 and fiscal 2008.

L. NON-REGULATORY GUIDANCE

1. The Commission's Director of Finance Policy is authorized to provide, upon written request, guidance on any issue arising from the administration of this program.
2. Eligible institutions may appeal the Director's guidance determinations to the Secretary of Higher Education. All appeals must be submitted in writing within thirty (30) days of the Directors of Finance Policy's notice and contain detailed reasons that would justify reversal of the original decision, including all appropriate documentation. The Secretary will review each appeal and make a decision within sixty (60) days after receiving the appeal. Written notification will be provided. All decisions of the Secretary are final.

EXAMPLES OF CALCULATIONS FOR STATE MATCH

Example 1:

John Doe contributed \$1,000 during the base year (July 1, 1997 - June 30, 1998). He contributed \$1,000 in July 1998, **MATCH:** There would be no State match since his contribution in July 1998 was not an increase over his contribution during the base year.

Example 2: Jane Doe contributed \$1,000 during the base year. She contributed \$1,500 in July 1998.

MATCH: The State would match \$500 since her contribution in July, 1998 was a \$500 increase over her contribution in the base year. Jane Doe contributed \$1,000 in July 1999.

MATCH: The State would not provide any match for this contribution, as it did not exceed the base year contribution.

Example 3:

John Doe pledged \$1,500 in May 1998 to be paid over the next three years. In July 1998 he contributed \$1,500, \$500 as the first installment of his May 1998 pledge, and \$1,000 as an additional contribution

MATCH: The State would match \$1,000.

Instructions for Completing Required Forms

Please note that draft forms are due to MHEC on or before July 15, identifying preliminary eligible matching funds. The final, audited forms are due no later than November 1.

- 1.) Certification Statement Form is a self-explanatory form outlining certification of eligible matches, foundation deposits and contribution requirements.
- 2.) Form 1 is a detailed breakdown of the endowment information of eligible matching funds shown on the certification statement along with personal information for the contact person.
- 3.) Form 2 is a detailed breakdown of the endowment information of actual State-matching funds allowed and paid under this program.
- 4.) Form 3 is the itemized breakdown of eligible matching funds by donor category from the amount shown on the certification statement.
- 5.) Form 4 is the payee designation form.
- 6.) Form 5 is the independent auditor certification form verifying eligible donations and State-matching funds.

MARYLAND HIGHER EDUCATION COMMISSION
PRIVATE DONATION INCENTIVE PROGRAM
CERTIFICATION STATEMENT FORM

(Name of the Institution)

We certify that during Fiscal Year (July 1, through June 30,)

_____ has received _____
(Name of Institution) (Dollar Amount)

and _____ has received _____
(Name of Affiliated Foundation)

_____ for a total of _____
(Dollar Amount) (Dollar Amount)

in contributions which meet the requirements of the Private Donation Incentive Program as described in Title 17, Subtitle 3, Sections 17-301 through 17-306 of the Education Article of the Annotated Code of Maryland, the Maryland Higher Education Commission Guidelines for the Private Donation Incentive Program, and all non-regulatory guidance issued by the Secretary of Higher Education.

Specifically, we certify that:

1. The total dollar amount being certified and for which matching State funds are being claimed are actual donations, not pledges.
2. The affiliated foundation is within the meaning of that term as defined in Section 15-104 of the Education Article of the Annotated Code of Maryland, is approved by the appropriate institutional governing board to operate as an affiliated foundation, and has its fiscal affairs audited annually by an independent certified public accountant.
3. All contributions for which matching State funds are claimed have been made to support this institution and have been specifically designated by the donor for endowments as defined in Section E of the Maryland Higher Education Commission Guidelines for the Private Donation Incentive Program.
4. All contributions are from donors who did not contribute during the base year, July 1, 1997 through June 30, 1998 or represent increases by the donors from the contributions made during the base year.
5. All contributions have been made under the condition that the principal of each endowment will remain intact and will be invested in perpetuity for the purpose of producing income.

6. Income from all endowments, which will receive funds under this program, will be used solely for academic purposes that are consistent with the role and mission of the institution as approved by the Maryland Higher Education Commission.
7. All contributions made to a foundation affiliated with more than one institution were for endowments to support this specific institution.
8. No endowment, which is to receive matching State funds under this program, supports intercollegiate athletic programs or athletic scholarships.
9. All matching State funds received through the Private Donation Incentive Program will be assigned to eligible endowments as defined in Section E of the Maryland Higher Education Commission Guidelines to support this institution.

We further certify that the accompanying endowment and donor information forms are to our best knowledge true and correct.

President of the Institution (Signature)

(Typed Name)

Chief Development Officer (Signature)

(Typed Name)

Chief Financial Officer/Comptroller of the
Institution* (Signature)

(Typed Name)

Chief Executive Officer (Signature)
of the Affiliated Foundation**

(Typed Name)

Treasurer of the Affiliated (Signature)
Foundation**

(Typed Name)

*Necessary only if some contributions were donated to the institution.

**Necessary only if some contributions were donated to an affiliated foundation.

Form - 1

**MARYLAND HIGHER EDUCATION COMMISSION
Private Donation Incentive Program
FY __ Eligible Endowment Information Funds**

Institution: _____

List all endowments toward which contributions have been made and for which matching State funds are claimed.

Name of Endowment	Amount*	Purpose

Total: (Should equal \$ amount \$ _____
in Certification Statement)

*Please round all figures to the nearest dollar

Question or comments regarding this submission should be directed to:

Name: _____
Title: _____
Address: _____
Phone #: _____
E-mail: _____

Form - 2

MARYLAND HIGHER EDUCATION COMMISSION
Private Donation Incentive Program
FY ____ State-Matching Endowment Information Funds

Institution: _____

STATE-MATCHING FUNDS WILL BE DISTRIBUTED AS FOLLOWS:

Name of Endowment	Amount*	Purpose

***Please round all figures to the nearest dollar.**

Form - 3

MARYLAND HIGHER EDUCATION COMMISSION
Private Donation Incentive Program
FY ____ Eligible Endowment Information Funds by Category

Institution: _____

Using the categories below, tally the donors for whose contributions matching State funds are claimed.

Categories of Donors	Total Number of Donors	Total Amount Donated by These Donors
Alumni**		\$
Parents**		
Trustees/Employees**		
Other Individuals		

Unduplicated Count of Persons		
Foundation		
Corporations/Businesses		
Religious Organizations		
Fund-raising Consortia		
Other Organizations		
Totals		

* Please round all figures to the nearest dollar.

** Individual donors and their contributions should be included in each of the categories.

*** The sum of these totals should agree with the amount on the Certification Statement and Endowment Information Form - 1.

Form - 4

**MARYLAND HIGHER EDUCATION COMMISSION
PRIVATE DONATION INCENTIVE PROGRAM
FY ____ PAYEE DESIGNATION FORM**

State-Matching Payments may be made to each public sector, higher education institution or its affiliated foundation.

Payments of FY ____ funds are to be disbursed to: (check only one)

_____ Institution _____ Foundation

Check Payable to: _____

Complete Mailing Address:

Employer I.D.: _____

If four-year institution designated, payment must be processed through the State Comptroller.

RSTARS Codes: Agency: _____ Program: _____ Fund: _____

Transaction Code: _____

Copy of RSTARS transmittal interface information should be sent to:

MARYLAND HIGHER EDUCATION COMMISSION
Private Donation Incentive Program
Independent Certification

Institution: _____

Eligible Actual Donations and State-Matching Funds Placed in Endowment Accounts:

**Eligible Actual Donations and State-Matching Funds
Placed in Endowments Accounts**

	FY99	FY00	FY01	FY02	FY03	FY04	FY05
Donor Funds							
State Matching Funds	N/A						

“Eligible donations and matching State payments have been placed in an endowment fund restricted to academic purposes and that disbursement from these accounts have been made in accordance with the provisions of the endowment.”

The above information regarding donations and grant receipts agrees with records of

(State Institution or Foundation)

If it does not, please note any exceptions below:

Independent Auditor: _____

Signature: _____

Date: _____



MHEC

Creating a state of achievement

Robert L. Ehrlich, Jr.
Governor

Michael S. Steele
Lt. Governor

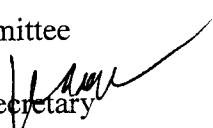
John J. Oliver, Jr.
Chairman

Karen R. Johnson
Secretary of Higher Education

MEMORANDUM

DATE: May 8, 2003

TO: Finance Policy Committee

FROM: Karen R. Johnson, Secretary  STAFF: Janice Doyle
Andrea E. Hunt

SUBJECT: Guideline Revisions for Student Financial Assistance Programs

The Office of Student Financial Assistance (OSFA) conducted an internal review of the guidelines for all programs administered by the office. As a result of this review, guideline changes are being proposed to bring programs into compliance with current procedures for operations. The following changes clarify program definitions, student eligibility, award amounts, verification procedures, calculation of grade point average, service obligation fulfillment, and administrative practices.

Student Financial Assistance Programs - Overall Guidelines: Expands the definition of eligible non-citizens based on federal regulations. Clarifies eligibility of home-school students for certain State scholarships. Removes definitions no longer in use including merit rank and the eligibility of legal guardians in the definition of parent. Clarifies that students receiving multiple scholarships with service obligations must perform their service in consecutive years. Creates a guideline, covering all programs, that funding is not guaranteed for all eligible students.

Educational Excellence Award Program: Clarifies award amounts and standard allowances for the program. Expands the definition of deadline to include priority consideration for the Guaranteed Access Grant. Clarifies acceptance procedures for the GA Grant. Provides an alternative procedure for the verification process to utilize information gathered by the institutions. Expands the documentation, which can be used for appeals due to special financial circumstances.

Program of Economic Development Student Assistance Grants - Overall Provisions: Removes procedures and reference to the Family Practice Program which is no longer funded.

Nursing: Clarifies the eligible enrollment categories.

MARYLAND HIGHER EDUCATION COMMISSION

839 Bestgate Rd. • Suite 400 • Annapolis, MD 21401-3013

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Physical and Occupational Therapists and Physical and Occupational Therapy Assistants: Revises procedures to allow for automatic renewal of scholarship as long as recipient continues to meet eligibility requirements.

Sharon Christa McAuliffe Memorial Teacher Education Award: Revises procedures for initial awarding based on self-reported enrollment status which is then confirmed by institution. Clarifies the requirement for an annual 3.0 grade point average for renewal.

Science and Technology Scholarship: Clarifies eligibility requirements of student receiving an award as a high school student or as a student applying for an award within 5 years of graduation.

Maryland Teacher Scholarship: Clarifies eligibility requirements of high school students and renewal students. Expands definition of service obligation for students with multiple awards. Expands eligibility for deferment to include students enrolled in full-time study.

Maryland HOPE Scholarship: Establishes verification procedures for certifying the income requirement. Clarifies procedures to be followed for the certification and calculation of grade point averages for the renewal and continuation of awards. Expands eligibility for deferment to include students enrolled in full-time study.

HOPE for Nontraditional Students – Community College Transfer Scholarship Program: Establishes in guidelines verification procedures for certifying the income requirement. Clarifies procedures to be followed for the certification and calculation of grade point averages for the renewal and continuation of awards.

Distinguished Scholar Program: Removes “vocal quality” and replaces with “timbre” as a rating factor for instrumental music in the talent category. Clarifies reinstatement procedures. Revises procedures for making awards to students who fall into unique circumstances including the addition of home-school students.

Maryland Part-Time Student Grant Program: Clarifies eligibility of dually enrolled students.

Nonresident Student Tuition Reduction and State Aid Program – Community Colleges: Removes Health Manpower Shortage Program from name. Adds licensure requirement for registered nursing participants.

Nonresident Student Tuition Reduction and State Aid Program – 4-Year Public Institutions: Removes Health Manpower Shortage Program from name. Adds licensure requirement for registered nursing participants. Clarifies the degrees eligible for award.

Edward T. Conroy Memorial Scholarship Program: Revises procedures to allow for automatic renewal of scholarship as long as recipient continues to meet eligibility requirements.

Developmental Disabilities, Mental Health, Child Welfare, and Juvenile Justice Workforce Tuition Assistance Program: Revises name of program in compliance with statute. Expands area of service to include children in the custody of the Department of Social Services or Department of Juvenile Justice or any residential childcare program licensed by the Department of Human Resources or the Department of Juvenile Justice. Revises procedures to allow for automatic renewal of scholarship as long as recipient continues to meet eligibility requirements.

Tuition Reimbursement of Firemen, Ambulance and Rescue Squadmen Program: Clarifies application procedures for reimbursement.

Graduate and Professional Scholarship Program: Expands eligible programs to include a Master's degree in Social Work as originally intended.

Senatorial Scholarship Program: Clarifies application and award roster procedures, as well as the carry-forward of fund balances into the next fiscal year.

Delegate Scholarship Program: Clarifies the administration of the program to specify when applicant rosters are sent and that fund balances carry over into the next fiscal year.

RECOMMENDATION: It is recommended that the Finance Policy Committee approve the proposed guideline changes for the General Rules and Definitions section for Student Financial Assistance Programs and the proposed guideline changes for specific Student Financial Assistance Programs.

MARYLAND HIGHER EDUCATION COMMISSION

OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR

STUDENT FINANCIAL ASSISTANCE PROGRAMS

APPROVED: JUNE 2002

REVISED AND SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION

Office of Student Financial Assistance

Guidelines for Student Financial Assistance Programs

AUTHORITY

These guidelines are provided to establish general rules and definitions for all student financial assistance programs administered by the Office of Student Financial Assistance Title 18 of the Education Article, Annotated Code of Maryland and to clarify the intent of pertinent federal general provisions governing student assistance program administration under federal Title IV in the Higher Education Act of 1965, as amended (20 U.S.C. §1070a-1-6).

A. PURPOSE

The Office of Student Financial Assistance shall have the following purposes:

1. to administer the scholarship and tuition assistance programs under Title 18;
2. to issue and disseminate public information about these scholarship programs;
3. to regulate the form and submission of applications for scholarship and tuition assistance under this title;
4. to analyze the financial need of each applicant for a scholarship for which need is a consideration, utilizing a uniform method;
5. to establish criteria for selection of recipients according to statutory requirements;
and
6. to administer federal programs of scholarships or grants to students or institutions.

B. DEFINITIONS

The following terms have the meanings indicated.

1. "Academic year" means a period of time in which a full-time student is expected to complete the eligible institution's requirement of academic progress of at least:
 - a. Two semesters, two trimesters, or three quarters; or

- b. Nine hundred clock hours.
- 2. "Office" or "OSFA" means the administrative department of the Maryland Higher Education Commission which manages the State financial aid programs.
- 3. "Clock hour" means the equivalent of at least 50 minutes in a:
 - a. Class, lecture or recitation; or
 - b. Faculty supervised laboratory, shop training, or internship.
- 4. "Commission" means the Maryland Higher Education Commission.
- 5. "Competitive examination" means the SAT I or the ACT .
- 6. "Cost of attendance" means reasonable educational expenses as calculated by the OFSA which may include tuition and fees, books and supplies, room and board or living expenses, miscellaneous personal expenses, and transportation costs for the academic period of aid application.
- 7. "Dependent student" means, in general, a student who is financially dependent upon his or her parents or other individuals. For State need-based scholarship programs, the official definition for dependent student shall be the one listed under 34 CFR Part 668, Section 668.2.
- 8. "Eligible institution" means an institution of post-secondary education in this State that possesses a Certificate of Approval from the Commission.
- 9. "Eligible noncitizen" means a person who is not a citizen of the United States but who meets the criteria specified under 34 CFR Part 668, Section 668.33 (a) (2).

An eligible noncitizen is one of the following:

- a. A U.S. permanent resident who has an Alien Registration Receipt Card (I-551 or I-151)
 - b. A conditional permanent resident (I-551C)
 - c. A noncitizen with a Departure record (I-94) from the U.S. Immigration and Naturalization Service (INS) showing any one of the following designations: "Refugee," "Asylum Granted," "Indefinite Parole," "Humanitarian Parole," or "Cuban-Haitian Entrant."
- 10. "Eligible student" means any student enrolled or accepted for enrollment at an institution of postsecondary education, meeting the criteria established under the individual program requirements in Education Article, Title 18.
 - 11. "Employment verification" means written documentation from an employer that a recipient of a grant or loan repayment assistance is performing work in a field which

the recipient is required to perform as a condition of receiving the grant or loan repayment assistance.

12. "Enrolled" means the status of a student who has completed the registration requirements except for payment of tuition and fees at the institution that the student is attending.
13. "Executive Director" means the chief administrative officer of the OSFA, ~~appointed by the State Secretary of Higher Education.~~ appointed
14. "Expected family contribution" means the amount an applicant and his or her spouse and family are expected to contribute toward the applicant's cost of attendance as described in Part F of Title IV of the Higher Education Act which is hereby incorporated by reference.
15. "Financial need" means the difference between the applicant's cost of attendance and the applicant's expected family contribution.
16. "Fiscal year" means the period from July 1 through June 30 each year.
17. "Full-time" means an academic workload which is equal to or exceeds one of the following minimum requirements:
 - a. Twelve semester or trimester hours per semester or trimester, twelve quarter hours per quarter or eighteen clock hours per week of undergraduate level coursework; or
 - b. Nine semester hours of graduate level coursework, carried by a student during a standard term or semester as defined by the eligible postsecondary education institution in which the student is enrolled.
18. "Full-time employment" means a minimum of 35 hours per week of regularly scheduled employment.
19. "Full-time equivalency" means enrollment in classroom, lab, clinic, practicum, or other academic courses which equal or exceed 180 clock hours per semester.
20. "Grade point average" means the average of the points assigned to a scholarship applicant's grades received in prior secondary and/or postsecondary educational courses.
21. "Graduate student" means a student who is enrolled in an academic program of study above the baccalaureate level leading to a post-baccalaureate certificate, certificate of advanced graduate study, master's degree or doctoral degree in an institution of higher education.

22. "Guaranteed promissory note" means a written contract obligating a recipient to repay the funds received if the recipient does not fulfill the service obligation which was a condition of the recipient's scholarship or grant award. The contract requires that a second party agree to repay the funds if the recipient neither performs the service obligation nor repays the funds.
23. "Guardian" means a person appointed as such by a court order recognized under the law of the State of Maryland.
24. "Home-school student" means in general a secondary student who is being educated by a parent or guardian under the guidance of a local school board or other home-school entity. These students do not attend recognized public or nonpublic schools.
254. "Independent student" means in general, a self-supporting student who is not financially dependent on his or her parents or any other individual. For State need-based programs, the official definition of independent student shall be the one listed under 34 CFR Part 668, Section 668.2.
265. "Initial award" means the first offer of financial assistance extended to an eligible applicant by the Office of Student Financial Assistance.
276. "Legislative district" means one of the legally established Maryland election districts.
287. "Mandatory fees" means the required charges, in addition to tuition, assessed by a institution of postsecondary education to its students during each semester or other period of enrollment specified by the institution.
298. "Maryland resident" means any student meeting the criteria of the Office of Student Financial Assistance listed under section D of this guideline.
3029. "Matriculated status" means the student is admitted as a recognized candidate for an appropriate degree, diploma, or certificate at an eligible institution of post-secondary education.
- ~~30. "Merit rank" means a ranking system, based on the applicant's scores from either the SAT I or the ACT examination which is used to determine an applicant's priority for an Educational Assistance Grant.~~
31. "Out-of-state school" means an accredited institution of postsecondary education located in the District of Columbia or in a state other than Maryland.

32. "Parent" means a student's natural or adoptive mother or father, ~~or legal guardian appointed by the court who is directed by the court to use his or her own resources to support the student.~~
33. "Part-time" means an academic workload which is less than "full-time" as defined in B. 17 of this guideline and equivalent to at least 6 semester or trimester hours per semester or trimester, 6 quarter hours per quarter or 9 clock hours per week of undergraduate or graduate level coursework.
34. "Permanent residence" means a person's permanent place of abode, as defined in section D. 3.
35. "Professional student" means a student who is enrolled in an academic program of study above the baccalaureate level in an institution of higher education leading to a degree or certificate for becoming a practitioner in a field including, but not limited to, law, medicine, dentistry, pharmacy, or nursing.
36. "Promissory Note" means a written contract obligating a recipient to repay the funds if the recipient does not fulfill the service obligation which was a condition of the recipient's scholarship or grant award.
37. "Reciprocity" means an agreement between Maryland and designated states to exchange student assistance funds in support of Maryland students attending out-of-state schools and other students attending Maryland institutions of postsecondary education.
38. "Satisfactory academic progress" means a standard of minimum academic performance established by the institution of postsecondary education where the student is enrolled.
39. "Spouse" means a partner in a legally contracted marriage recognized under Maryland law.
40. "State" means the geographic area and political entity known as the State of Maryland.
41. "Student" means any person who has applied to attend, is attending or has attended an institution of postsecondary education.
42. "Support" means financial or material support, including gifts, services, trusts, and income or benefits derived from one's family.
43. "TFC rank" means a ranking system used to determine an applicant's priority for an Educational Assistance Grant based on the applicant's expected family contribution.

44. "Undergraduate" means a student who is enrolled in an academic program of study in an institution of higher education at or below the baccalaureate level leading to either a certificate, nursing diploma, associate's degree or bachelor's degree.
45. "U. S. citizen" means one who under the Constitution and laws of the United States is a native-born or naturalized citizen of the United States of America.
46. "Verification" means the procedures implemented by the ~~Administration~~ OSFA to validate the eligibility of applicants for student assistance awarded based on financial need.

C. STUDENT APPLICANT ELIGIBILITY REQUIREMENTS

Eligibility for OSFA programs varies by individual program. Unless otherwise stated in the individual program description, the following list of criteria is required for all OSFA programs.

To qualify for OSFA programs, the applicant shall:

1. maintain Maryland residence status as defined under section D of this guideline;
2. be enrolled or accepted for admission in an institution of postsecondary education or out-of-state school as defined in sections B. 8 and B. 31 of this guideline;
3. maintain the satisfactory academic progress standards of the institution of postsecondary education in which the student is enrolled;
4. complete an official application as required by the particular ~~scholarship~~ financial assistance program.

D. MARYLAND RESIDENCY REQUIREMENTS

This policy applies to all OSFA scholarship and grant programs which require Maryland residence as a condition of receiving financial assistance. This policy is not intended to displace, supersede or affect in any manner other definitions of residency used by any institution or agency for any other purpose and it applies only to OSFA programs.

1. Required Period of Residency

Applicants shall establish that they have been residents of the State of Maryland for the required time frame as specified below. The required time frames are based upon the type of institution the student will be attending and are for the period immediately preceding the first day of class for the first session in which the student would receive a State scholarship award.

- a. Students enrolling in public four-year colleges and universities must have established Maryland residence for a period of 12 months preceding the first day of class for the first session in which the student would receive a State scholarship award.
- b. Students enrolling in public community colleges must have established Maryland residence for a period of 3 months preceding the first day of class for the first session in which the student would receive a State scholarship award.
- c. Students enrolling in independent colleges and universities must have established Maryland residence for a period of 12 months preceding the first day of class for the first session in which the student would receive a State scholarship award.
- d. Students enrolling in private career schools must have established Maryland residence for a period of 3 months preceding the first day of class for the first session in which the student would receive a State scholarship award.
- e. Students enrolling in out-of-state schools shall establish residency for a period of time equal to the required time frame for a comparable institution of postsecondary education within the State.

2. General Criteria

Recipients of Maryland State scholarships will be considered as Maryland residents if one of the following criteria are met:

- a. the student is dependent upon a parent(s) or spouse who has maintained a permanent residence in Maryland for the required period of residency described in section D of this guideline.
- b. the student is independent and has maintained a permanent residence in Maryland for the required period of residency described in section D of this guideline.
- c. the student is a full-time active member of the Armed Forces of the United States who is stationed in the State of Maryland or whose home of residency is Maryland.
- d. the student is a dependent spouse or dependent child of a full-time active member of the Armed Forces of the United States who is stationed in the State of Maryland or whose home of residency is Maryland.

3. Permanent Residence

In determining if permanent residence has been established in Maryland, the following criteria shall be taken into consideration. The applicable criteria must be met for the required period of residency as described in section D of this guideline. The criteria are as follows:

- a. owns or rents and occupies living quarters in Maryland;
- b. maintains within Maryland substantially all personal property;
- c. pays Maryland income tax on all earned taxable income including all taxable income earned outside the State;
- d. registers all owned motor vehicles in Maryland in accordance with Maryland law;
- e. possesses a valid Maryland driver's license, if licensed, in accordance with Maryland law;
- f. is registered to vote in Maryland, if registered to vote; and
- g. receives no public assistance from a state other than the State of Maryland or from a city, county or municipal agency other than one in Maryland.

4. Appeals

A student may appeal a denial of Maryland residency under the appeal mechanism defined in section F of this guideline.

5. Change of Status

Maryland residency status is lost at any time that an independent student, or the parent or spouse through whom a dependent student has attained Maryland residency status, establishes a domicile outside the State. The student shall be considered an out-of-State student in the first academic term, trimester, or semester after the out-of-State move occurs.

E. PROFESSIONAL JUDGMENT

The Executive Director of the Office of Student Financial Assistance or the Executive Director's designee may make necessary adjustments to a student's eligibility for a State scholarship award on the basis of adequate written documentation of extenuating circumstances.

F. APPEAL PROCEDURES

1. Appeals of decisions of ineligibility or revocation of State scholarship awards are made to the Executive Director of the Office of Student Financial Assistance. All appeals must:
 - a. be in writing;
 - b. be submitted within 30 days of notice of ineligibility or cancellation of award; and
 - c. detail reasons and/or circumstances that would justify reversal of the original decision, including all appropriate documentation.
2. The Executive Director will review each case and make a decision based on the written materials submitted no later than forty-five (45) days after receiving the appeal. The student will be notified in writing of the Executive Director's decision. All decisions of the Executive Director are final.

G. HOLDING MULTIPLE STATE GRANTS AND SCHOLARSHIPS

A student may hold any State grant or scholarship issued under Title 18 with any other issued under this title as long as:

1. eligibility requirements are met for each scholarship and grant received; and
2. the total of all scholarships and grants does not exceed:
 - a. the student's total cost of education as certified by the institution the student is attending; and
 - b. the equivalent annual expenses of a full-time resident undergraduate at the 4-year public institution of higher education within the University System of Maryland, other than the University of Maryland University College and the University of Maryland, Baltimore, with the highest annual expenses for a full-time resident undergraduate.

H. HOME SCHOOL ELIGIBILITY

1. Home school students are eligible to participate in OSFA's financial assistance programs as long as:

- a. The entity that supervises the home instruction and establishes the curriculum holds a Certificate of Approval or is registered to supervise home instruction by the Maryland State Department of Education and the local county board of education; and
 - b. the curriculum is clearly identified with grades on an official transcript.
2. For home school students applying for the achievement category of the Distinguished Scholar program, in addition to the provisions in 1. above, the achievement application must be signed by home school oversight entity with a letter from the local education agency.
3. For home school students applying for the talent category of the Distinguished Scholar program only the following provisions apply:
- a. The entity that supervises the home instruction and establishes the curriculum must hold a Certificate of Approval or be registered to supervise home instruction by the Maryland State Department of Education and the local county board of education; and
 - b. the talent application must be signed by an administrator of the home school supervising entity or an individual affiliated with the local education agency.

I: SERVICE OBLIGATION:

Students holding more than one scholarship requiring performance of a specific service, must repay the service obligations in consecutive years.

J. FUNDING:

Funding for all State Scholarships and Grants shall be as provided for in the State budget of the Commission and regulated through Maryland Annotated Code. All awards are contingent upon the continued availability of such funding. Awards are not guaranteed even if an individual meets all minimum eligibility requirements.

MARYLAND HIGHER EDUCATION COMMISSION
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES
FOR THE
EDUCATIONAL EXCELLENCE AWARD PROGRAM

APPROVED: JUNE 2002
REVISED & SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION

Office of Student Financial Assistance

Guidelines for the Educational Excellence Award Program

AUTHORITY

This program of student assistance was enacted into law by the 1991 Scholarship Reform Act as passed by the Maryland General Assembly (Annotated Code, Education Article, Section 18-301). This law gives the Maryland Higher Education Commission of Maryland the authority to adopt regulations to administer the program.

A. PURPOSE

The purpose of the Educational Excellence Award (EEA) program is to provide need based scholarship assistance. The state's neediest students will be guaranteed access to postsecondary education in Maryland through Guaranteed Access (GA) Grants. Low and middle-income students will be awarded financial assistance through Educational Assistance (EA) Grants. The Educational Excellence Award program will use monies from the State of Maryland General Fund, combined with federal Leveraging Educational Assistance Partnership (LEAP) dollars.

B. ELIGIBILITY

1. To be eligible for financial assistance under the Educational Excellence Award program, an applicant must meet the following general requirements:
 - a. be a Maryland resident;
 - b. file the Free Application for Federal Student Aid (FAFSA) by the March 1 deadline for priority funding under the GA Program or to be eligible for the EA Program;
 - c. be enrolled as a full-time student;
 - d. be accepted for admission in a regular undergraduate program leading to a degree or a diploma at an eligible institution;
 - e. demonstrate financial need based on the Office of Student Financial Assistance (OSFA) formula described in E.1

2. To be eligible for a Guaranteed Access Grant, applicants must meet the following additional requirements:
 - a. file a GA Grant application with the OSFA by March 1 to be eligible for priority funding;
 - b. have an annual total family income below 130% of the federal poverty level as reported on the FAFSA;
 - c. begin college within one year of completing high school;
 - d. be under the age of 22 at the time of the first award;
 - e. have successfully completed a college preparatory program in high school (College preparatory programs are defined by OSFA as those programs established by local educational agencies (LEAs) which are designed to prepare students for college level work, including programs that prepare students to achieve a two-year technical degree from a community college);
 - f. have completed high school ~~in the State of Maryland~~ with an unweighted cumulative grade point average (GPA) of at least 2.5 on a 4.0 scale or its equivalent;
 - g. submit a high school transcript to the OSFA after the completion of the first semester of the senior year along with the GA application by March 1 for priority consideration; and
 - h. be in senior year of high school at the time of initial application.

C. APPLICATION

Students can apply for an Educational Assistance Grant or a Guaranteed Access Grant as follows:

1. Educational Assistance Grant - students must file a FAFSA by March 1 each year.
2. Guaranteed Access Grant - students should file a FAFSA by March 1 each year. In addition, first time applicants should submit to the Office of Student Financial Assistance a Guaranteed Access Grant Application by March 1 for priority consideration.

D. AWARD AMOUNT

Under the Educational Excellence Award program, award amounts will be determined by the Office of Student Financial Assistance based on financial need.

1. The statute for the Educational Assistance Grant authorizes award amounts ranging between \$400 and \$3,000 to be awarded in \$100 increments. Based on funding available for this grant, the Commission will~~has~~ established a maximum award of \$2700, for fiscal year 2001, increasing annually by \$100 until the \$3000 maximum is reached
2. Students qualifying for a Guaranteed Access Grant will receive an award equal to one hundred percent of the student's adjusted financial need as described in E (Award Calculation, below). Award amounts will range from \$400 up to a maximum award not to exceed the equivalent annual expenses of a full-time resident undergraduate at the four-year public institution of higher education within the University System of Maryland, other than the University of Maryland University College and the University of Maryland, Baltimore, as calculated by OSFA, in \$100 increments.

E. AWARD CALCULATION

1. Determination of Financial Need

OSFA Cost of Attendance
 minus Total Family Contribution x Regional Cost of Living Adjustment
 minus HOPE Scholarship or Economic Development Student Assistance Grant
 minus Estimated Pell Grant
 equals OSFA Adjusted Need

- Total Family Contribution is determined using the Federal Methodology formula.
- The Regional Cost of Living Adjustment is determined annually by the Commission.

OSFA Cost of Attendance is calculated using the following classifications:

- Student living with parents: Tuition and Mandatory Fees plus \$3,200 an allowance established by the OSFA with a minimum value of \$2500
- Student living off-campus: Tuition and Mandatory Fees plus \$5,100 an allowance established by the OSFA with a minimum value of \$4000
- Student living on-campus: Tuition and Mandatory Fees, Room and Board plus \$900 an allowance established by the OSFA with a minimum value of \$900

2. Awards made under the EEA program are calculated using data from the FAFSA.
 - a. Educational Assistance Grants are calculated in the following manner:
$$\text{OSFA Adjusted Need} \times 30\% \text{ to } 40\% = \text{Educational Assistance Grant}$$
 - b. Guaranteed Access Grants are calculated in the following manner:
$$\text{OSFA Adjusted Need} \times 100\% = \text{Guaranteed Access Grant}$$

The maximum Guaranteed Access Grant is limited to the amount specified in D.2.
 - c. Award amounts are calculated on an annual basis and are rounded to the nearest \$100. If a student's award amount falls below \$400, they are not eligible for an award. Awards are made for the Fall and Spring semesters in the academic year with one-half of the annual amount awarded for each semester.
3. Awards are based on information provided by the student to the federal processor. Errors on the application that are corrected by students after the deadline will be accepted by OSFA. Changes in award amounts as a result of corrections will be handled as follows:
 - a. EA and GA Grants - If a correction results in a decrease in an award amount, the award will be adjusted and the student notified of the change. If a correction results in an increase in an award, the increase will be funded only if monies are available.
 - b. GA Grants Only - If a correction in family income or size results in the student no longer being eligible for a GA Grant, the student's award will be recalculated as an EA Grant.

F. DISTRIBUTION OF FUNDS AND SCHEDULE OF REDUCTIONS

On an annual basis the Secretary of Higher Education will determine an amount to be allocated from the Educational Excellence Awards Program budget specifically to award Guaranteed Access Grants. The remainder of the funds will be awarded as Educational Assistance Grants.

Prior to making GA and EA Grants, the OSFA will determine the funds required to award GA Grants at 100 percent of need. If the remaining funds are sufficient to make EA Grants at the same level as in the prior year in terms of the percent of need met and the number of recipients, the

OSFA will proceed with making awards. If funds are not sufficient to fund the GA Grants at 100 percent of need and maintain the EA Grants at the same level as the prior year, the Secretary will determine a schedule of reductions for GA and EA Grants. The minimum funding for the EA Grant will not fall below the level of 30 percent of need with a maximum award of \$3,000.

If additional funds are available after GA Grants are funded at 100 percent of need and EA Grants are funded at the same level as the prior year, the additional funds will be used to increase the percent of need met and the maximum award in the EA Grant up to 40 percent and \$3,000, unless otherwise determined by the Commission within the first four years of implementation.

G. SELECTION OF RECIPIENTS

Applications for the Guaranteed Access Grant, which are filed by March 1, will be funded prior to all other Educational Excellence Awards applicants. Applications filed after that date will be processed on a first-come, first-served basis.

1. First time GA applicants who submit their applications prior to March 1 and all renewal GA applicants who meet all eligibility requirements will be awarded first.
2. All other GA applicants will be awarded on a first-come first-served basis.
3. Applicants eligible for the EA Grant will be selected in the following manner:
 - a. renewal applicants for EA Grants are awarded first as long as all criteria specified in I. below are met; then
 - b. remaining funds are awarded to all other eligible applicants until all funds are depleted. Students are selected based on a statewide ranking of student's Total Family Contribution (TFC) and need, with the lowest TFC's and greatest need awarded first.

H. AWARD NOTIFICATION

Recipients are notified in writing of their award. ~~In order to~~ To accept an award, GA and initial EA Grant recipients must provide written acceptance of the award and submit any other required documentation. A GA Grant recipient's award will automatically be accepted for the student. The student should contact OSFA in writing if he/she wishes to reject the award.

I. RENEWAL AND CONTINUATION

1. An Educational Assistance Grant may be renewed if the recipient:
 - a. files a FAFSA by the March 1 deadline;

- b. demonstrates financial need;
 - c. is enrolled in an eligible institution;
 - d. is enrolled as a full-time student (or the equivalent) for each semester;
 - e. is making satisfactory progress according to institution standards in compliance with federal Title IV program regulations; and,
 - f. is a resident of the State of Maryland.
2. A Guaranteed Access Grant may be renewed if the recipient:
- a. files a FAFSA;
 - b. has an annual family income below 150% of the federal poverty level as reported on the FAFSA;
 - c. is enrolled in an eligible institution;
 - d. is enrolled as a full-time student (or the equivalent) for each semester;
 - e. is making satisfactory progress according to institution standards in compliance with federal Title IV program regulations; and,
 - f. is a resident of the State of Maryland.

Recipients who no longer meet this requirement will be considered eligible for an EA Grant, as long as all other conditions described above are met.

J. CANCELLATION OF AWARD

An award will be canceled:

- 1. if the recipient of an EA Grant fails to sign and return the award letter (along with any additional documentation requested by OSFA) within the time specified in the letter;
- 2. if the recipient fails to pass verification requirements; or,
- 3. if the institution reports on the billing roster that the recipient is not:
 - a. enrolled at that institution in a regular undergraduate program;

- b. enrolled as a full-time undergraduate;
- c. making satisfactory academic progress;
- d. a resident of the State of Maryland; or,
- e. is in default for a Title IV loan or owes a refund of Title IV assistance.

K. PAYMENT

Payment is made to the institution for each semester that the recipient is attending. At the beginning of each semester, institutions will be asked to review billing rosters provided by OSFA to certify that the recipient meets the requirements specified under J.3.

Institutions are responsible for disbursing the funds to eligible students in a timely fashion.

L. VERIFICATION

1. In-house verification option:

- a. OSFA annually verifies application information for a percentage of all new Educational Excellence Award recipients to determine if students are submitting accurate information for determining their awards. OSFA verifies Educational Excellence Award applications of recipients identified by OSFA and institutions as having severe discrepancies in the information contained on their FAFSA or misreported dependency status or Maryland residency and OSFA may also select students randomly for verification. Selected recipients are required to provide documentation of financial data and to verify Maryland residency.
- b. Students are notified in writing of their selection for verification and are requested to provide the following documents within four weeks:
 - i. Maryland Office of Student Financial Assistance Dependent or Independent Verification Form to verify:
 - (A) child support;
 - (B) other untaxed income;
 - (C) Maryland residency for non-tax filers;
 - (D) non-filing status for non-tax filers.
 - ii. Federal and state income tax returns of parents, student and spouse, to verify:

(A) income, federal taxes paid; and

(B) Maryland residency.

Awards for students who fail to provide the requested information by the deadline will be canceled for the entire academic year.

Students who provide the requested documentation will be verified in accordance with the procedures established by OSFA. Awards for students with errors will be recalculated and adjusted as specified in E.3. or canceled accordingly.

2. Institutional verification option:

- a. OSFA is required annually to verify application information for a percentage of all new Educational Excellence Award recipients to determine if students are submitting accurate financial data for determining their awards.
- b. OSFA will select students flagged for federal verification and submit those selected to the institution to which they are attending. The percent of flagged students selected will be as follows:
 - i. 50% of all students who have received an EA Grant.
 - ii. 100% of initial GA Grant recipients.
 - iii. 50% of renewal GA Grant recipients.
- c. Once students are selected, schools are required to verify the following using federal standards:
 - i. Taxable and non-taxable income of student and parents (if a dependent student)
 - ii. Household Size
 - iii. Number in College
 - iv. Enrollment status (undergraduate or graduate)
 - v. Housing status
 - vi. Dependency status

vii. Expected Family Contribution

viii. Transaction number of ISIR used

- d. Schools must provide updated and verified data to OSFA by the date established each year.
- e. Information verified by the institutions will be used to update OSFA records. Awards for students with corrections and errors will be recalculated and adjusted as specified in E. Award Calculation, section 3 or cancelled accordingly.

M. LATE AWARDS

OSFA will consider students for late EA Grants should funds become available after initial awards have been made.

1. Priority for Late Awards

Consideration for a late award will be given in the following descending order to students who:

- a. were previously awarded and have requested reinstatement of a canceled award;
- b. applied on time and filed appeals based on changes in their financial circumstances;
- c. applied on time and were eligible for an award but were not funded;
- d. were late in applying, appealed for consideration and were placed on the waiting list; and,
- e. applied after the deadline.

2. Selection of Recipients

- a. Upon determination of the availability of sufficient funds to make late awards, OSFA will fund EA grant recipients in the order described above and notify recipients and institutions.
- b. If funds become available after commencement of the Fall semester and are sufficient to award category M.1.e., OSFA will have the eligibility of the

students in these two categories certified by the institution before making awards.

N. APPEALS

1. Categories of Appeals

~~EEA applicants and recipients can appeal their eligibility for an award for the following criteria:~~

a. EA and GA Grant applicants and recipients can appeal their eligibility if an award for the following criteria:

- (1) **be enrolled as a full-time student (or the equivalent):** Students enrolled for less than twelve credits can still be considered eligible for the EEA program if they are participating in a specific course or activity (such as an internship or a practicum) that is required by the institution to complete their academic program. To be considered full-time, the actual time spent in the classroom, lab, supervised activity or clinic must equal 180 clock hours or more in a regular semester. Also, the student must be enrolled for a minimum of 6 credit hours. Documentation must be provided as specified in 2. Appeal Procedures , section a., as noted below.
- (2) **fifth year award:** students may hold an award for a fifth year if, according to the institution, he or she is enrolled in an academic program that requires five years to complete or if the student provides OSFA with evidence of extenuating financial, academic, or other circumstances that prevent the student from completing their academic program in four years. Documentation must be provided as specified in 2. Appeal Procedures, section b., as noted below.
- (3) **special financial circumstances:** OSFA recognizes that the financial circumstances of students can change dramatically after their applications for need-based scholarships have been filed. In order to assist these students, OSFA will make adjustments with adequate documentation (as specified in Appeal Procedures, section c.) to the family contribution as follows:
 - (a) the student's parent(s) or spouse dies after submission of the application: the OSFA will adjust FAFSA income information to exclude the income of the parent(s) or spouse affected;

- (b) the student or the student's parent's divorce or separate after submission of the application: the OSFA will adjust FAFSA income information to exclude the income of the parent(s) or spouse affected;
- (c) the student, student's parent (if dependent) or student's spouse, if married and independent, becomes unemployed for at least ten weeks in the current year: the OSFA will calculate student's family contribution and total family income using an estimated income for the current calendar year.
- (d) the student or the student's parent(s) loses, as a result of the student reaching the age of majority, benefits from Social Security, AFDC, or child support: the OSFA will calculate the student's family contribution and total family income using an estimated income for the current calendar year.

~~To request a change in financial circumstances students must submit documentation specified in 2.c. below.~~

b. GA applicants and recipients:

- (1) **have completed high school with a grade point average of at least 2.5 on a 4.0 scale or its equivalent:** Applicants who fail to meet this requirement because of extenuating circumstances can appeal only after submitting a letter of recommendation from their high school principal. They must provide satisfactory evidence to OSFA of any of the extenuating circumstances as specified in 2.b. below.
- (2) **begin college within one year of high school graduation:** Applicants who fail to meet this requirement must provide satisfactory evidence to OSFA of any of the extenuating circumstances as specified in 2.b. below.
- (3) **annual family income of GA grant recipients must remain at 150% of the federal poverty level in order to continue receiving the award:** Students who are no longer eligible for the GA program because their annual family incomes rise above the poverty level threshold must provide satisfactory evidence to OSFA of special financial circumstances as specified in N.1.a. (34) above.

2. Appeal Procedures

The recipient must complete an appeal form provided by the Office of Student Financial Assistance. In completing the appeal form, the student must document the conditions upon which the appeal is based as specified below. Upon receipt of the appeal, the documentation will be reviewed and a decision will be rendered. The student will be notified of the outcome of an appeal.

- a. **full-time equivalency:** If a student is enrolled in a specific course or activity (such as an internship or practicum) that is required by the institution to complete their academic program that results in the student being enrolled for less than 12 credit hours, the student may appeal for consideration for an award. In addition to the appeal form, the student must submit documentation, which includes a statement from the student's department chair that describes the program requirements for that semester and a catalog description of the program and classes involved. The documentation shall also list the number of clock hours required for each activity.
- b. **academic requirements:** The following circumstances are considered acceptable as grounds for an appeal:
 - (1) serious illness or injury of the student;
 - (2) serious illness of a member of the student's immediate family;
 - (3) serious personal emotional difficulties of the student;
 - (4) the death of a member of the student's immediate family; or
 - (5) other serious personal circumstances.
 - (6) for fifth year award appeals only, student is enrolled in an academic program that requires 5 years to complete.

The documentation shall be an appeal form accompanied by a statement from an attending physician, psychologist, mental health professional, guidance counselor, social worker, a death certificate, or if the above do not apply, a statement from the Dean of Students or other officer at the student's institution.

- c. **special financial circumstances:** Documentation must be an appeal form along with a copy of the deceased's death certificate, separation agreement or divorce decree, notice of job termination or layoff, copies of Federal tax returns and/or W-2 forms, or copies of termination notices from relevant agencies.

3. Adjustment of Awards

The following adjustment of awards will be made for appeals, which are granted:

- a. if an appeal is granted prior to awards being made for the upcoming year, the student's eligibility for an award will be based on the new information;
- b. if the student has not been awarded a scholarship and submits the appeal after awards have been made for the upcoming year and the appeal is granted, the student will be placed on the waiting list for an award if the change in circumstances makes that student eligible for an award; or,
- c. if the student has already been awarded a scholarship and submits an appeal and the appeal is granted, the student will be placed on a waiting list for any additional funds for which they may be eligible due to the outcome of the appeal.
- d. if the student's appeal for the 12-credit equivalency has been approved, the student enrolled in 9-11 credits will receive three-quarters of the original award and a student enrolled for 6-9 credits will receive one-half of the original award. No award will be less than the statutory minimum award.

O. CAMPUS-BASED AWARDS

The Commission shall allocate funds to institutions of higher education in the State of Maryland to make awards to students who applied after the March 1st deadline or who have other extenuating circumstances.

1. Funds will be awarded to institutions based on the proportion of full-time Pell eligible Maryland residents enrolled at each institution.
2. These funds shall be awarded by institutions to students who meet the eligibility criteria for EA Grant awards as described in B (1) (a), (c), (d) and (e) but who did not apply by the March 1 deadline or who have other extenuating circumstances. These students must be eligible for a Pell Grant.
3. Awards shall be made in the amounts and the manner described in E. above with the same minimum (\$400), maximum (established annually) and percent of need (established annually) and rounded to the nearest \$100 increment.
4. The institution may not award a campus-based Educational Assistance Grant to a recipient of a Guaranteed Access or Educational Assistance Grant offered by the Office of Student Financial Assistance. Students may hold other state scholarships or grants but must meet all conditions for all awards and may not receive an amount combined from all State programs that exceeds the maximum amount established in the OSFA General Policies.

5. Each institution of higher education in the State of Maryland that participates in the campus-based Educational Assistance Grant program must submit reports as follows:

- a. January 15th – Fall Semester Awards
- b. June 15th – Spring Semester Awards
- c. October 1st – End of Year Report

The reports should contain the following information on students awarded:

- a. student name;
- b. social security number;
- c. institutional cost of attendance;
- d. Expected Family Contribution;
- e. amount of Pell Grant disbursed
- f. amount of campus-based EA Grant awarded;
- g. Pell I.D. and transaction number from the ISIR used for awarding.

MARYLAND HIGHER EDUCATION COMMISSION
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES
FOR THE
PROGRAM OF ECONOMIC DEVELOPMENT
STUDENT ASSISTANCE GRANTS
General Provisions

APPROVED: JULY 2000

REVISED AND SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION
Office of Student Financial Assistance

Guidelines for the
Program of Economic Development Student Assistance Grants

AUTHORITY

This program of student assistance grants was enacted by the 1991 Maryland General Assembly. This law, codified in Annotated Code, Education Article, §18-701, gives the Maryland Higher Education Commission the authority to adopt guidelines or regulations, to administer this program, and to restructure an existing economic development student assistance grant program in order to address the existing critical shortages under the program.

.01 GENERAL PROVISIONS

Section .01 applies to all grant programs in this title including Sharon Christa McAuliffe Memorial Teacher Education Award, Physical and Occupational Therapists and Physical and Occupational Therapy Assistants Grant Program, Child Care Provider Grant Program, and Nursing Scholarship. Additional conditions for each grant program are specified in the individual grant program guideline.

A. PURPOSE

The purpose of this program is to address the economic development needs in the State by providing financial assistance to students enrolled in certain programs leading to employment in fields of geographic or critical shortage in Maryland. This program requires participating recipients to seek employment actively in designated shortage areas throughout the State of Maryland. The following fields are those for which there are specific grant programs in these guidelines: ~~family practice medicine,~~ occupational and physical therapists and assistants, teachers, child care providers, and nurses.

B. ELIGIBILITY

A recipient of assistance under this program must:

1. be a resident of Maryland;
2. be enrolled, or sign a letter of intent to enroll, in an eligible institution in Maryland in an eligible academic program as specified in these guidelines; and

3. furnish a guaranteed promissory note agreeing to perform the required service or repay the grant if the service obligation is not performed.

C. AWARD AMOUNT

The annual amount of the grant varies by grant program. A recipient of this assistance is not eligible to receive an award from any other State scholarship program administered by the Office of Student Financial Assistance. The tuition assistance may be applied to tuition charges, fees, room, board, or other related educational expenses as identified in the specific grant program section.

D. APPLICATION

A specific application for economic development grant programs is available from financial aid offices at eligible Maryland institutions or by contacting the Office of Student Financial Assistance. Application deadlines are set annually.

E. SELECTION OF RECIPIENTS

Recipients will be selected by the Office of Student Financial Assistance based on criteria for each grant program.

F. AWARD NOTIFICATION

Recipients will be notified in writing of the grant award. In order to accept an initial award, the recipient must ~~provide written acceptance of the award and must sign a~~ guaranteed promissory note as specified in .01.K.2.

G. AWARD PRIORITIES

Priority is given to applicants who are applying to renew their grants. New applicants are awarded based on available funds.

H. RENEWAL AND CONTINUATION

The grant may be renewed if the recipient:

1. remains enrolled in an eligible program;
2. makes satisfactory academic progress according to the institution's standards; and
3. continues to meet all eligibility requirements for the specific grant program.

I. REVOCATION OF AWARD

An award will be revoked for a recipient who:

1. transfers between eligible schools without prior notification to the Office of Student Financial Assistance;
2. fails to remain enrolled in an eligible program at an eligible institution;
3. no longer meets institutional standards of satisfactory academic progress; or
4. no longer meets Maryland residency requirements.

J. PAYMENT

At the beginning of each school term, eligible institutions shall certify on billing rosters that the recipient:

1. is enrolled in an eligible program for which the student has received a grant;
2. is making satisfactory academic progress toward the required degree or diploma; and
3. is enrolled for the required minimum number of credits.

K. OBLIGATION OF AWARD RECIPIENTS

The recipient of an award under this program is obligated to:

1. ~~furnish the State Scholarship Administration with written acceptance of the award;~~
12. sign a guaranteed promissory note provided by the Office of Student Financial Assistance which states that the recipient will agree to fulfill the obligations of the grant program or repay the amount of the scholarship received plus interest;
23. enroll in and complete an approved eligible program at an eligible postsecondary institution leading to employment in Maryland in the field for which the award was granted;
34. maintain that institution's standard of satisfactory academic progress; and
45. complete the service obligation.

L. SERVICE OBLIGATION

The recipient is obligated to perform the required service. On the forms provided by the Office of Student Financial Assistance, the employing or contracting agency or approved

employer must certify annually that the recipient is performing the service requirement in the manner prescribed.

Service must begin within six months of completion of the degree, ~~or, for Family Practice grant recipients, six months within completion of the required residency.~~ Except for teachers, one calendar year of service is required for each academic year the recipient was awarded a scholarship. For teachers, one school year of service is required for each academic year the recipient was awarded the scholarship.

An academic year is defined as two semesters. A school year is the period of time during which a full-time teacher is contractually obligated to be in the classroom or performing work for the local educational agency.

M. REPAYMENT

A recipient will be required to repay the scholarship if the recipient:

1. has the award revoked;
2. fails to receive the appropriate degree, diploma or certificate at program completion;
3. fails to become licensed or certified as required;
4. has license or certification revoked during period of service obligation;
5. fails to complete the annual questionnaire on performance of service obligation;
6. fails to perform the required service for the required amount of time;
7. fails to receive the required supervision; or
8. otherwise fails to carry out the obligations of the scholarship.

Interest on the funds advanced is an interest rate equal to and matching the interest rate established by the United States Department of Education for the Federal Stafford Loan on the first day of July of each year (enacted by the Maryland General Assembly October 1, 2000), with interest not accruing prior to notification to the Commission of a recipient's graduation or termination from an institution of higher education. Repayment of the grant is waived at the rate of one academic year for each calendar or school year the recipient performs the service obligation. The repayment schedule is established by the OSFA, and payment must be completed within 6 years after repayment begins, ~~or, for Family Practice recipients, within 10 years after the repayment period begins.~~

N. DEFERMENT OR WAIVER OF THE SERVICE OBLIGATION AND REPAYMENT

It is the intention of the Office of Student Financial Assistance that the recipient will seek employment aggressively in all regions of the State in which eligible employment opportunities exist in the eligible fields.

1. Deferment - A recipient may receive a deferment during the time the recipient is:
 - a. enrolled in a full-time or part-time course of study at an institution of higher education in a degree granting program;
 - b. on a temporary leave of absence approved by the employer or the OSFA from full-time employment in the required employment field;
 - c. temporarily totally disabled, for a period not to exceed three years;
 - d. unable to secure employment for a period not to exceed twelve months by reason of the care required by a spouse or child who is disabled;
 - e. seeking and unable to find the required employment for a single period not to exceed 12 months; or
 - f. seeking and unable to find full-time employment for a single period not to exceed twelve months.
2. Deferment Documentation - To qualify for any of the deferments a recipient shall notify the Office of Student Financial Assistance and the Central Collection Unit if the repayment period has begun of the recipient's claim for the deferment and provide supporting documentation. Such documentation shall consist of:
 - a. certification by the office of the registrar if the recipient has returned to a full-time or part-time course of study at an eligible institution of higher education;
 - b. certification by the employer that the recipient is on a temporary approved leave of absence from the required employment;
 - c. a sworn affidavit of a qualified physician that the recipient is temporarily totally disabled;
 - d. a sworn affidavit of a qualified physician if the recipient is unable to find employment by reason of the care required by spouse or child who is disabled;

- e. a certified statement including a list of possible eligible employers with their addresses and telephone numbers to which application has been made if the recipient has been unable to find full-time employment in the required field; or
 - f. a certified statement including a list of possible employers with their addresses and telephone numbers to which application for employment has been made if the recipient is seeking and unable to find full-time employment.
- 3. Evaluation of Documentation - The Office of Student Financial Assistance shall review all documentation to determine whether the deferment conditions have been met and, if so, for what time periods. Before a deferment based on inability to find employment in the eligible field is granted, the Office of Student Financial Assistance will review the submitted documentation and any other information available to it for evidence that the recipient has sought employment aggressively in all regions of the State in which eligible employment opportunities exist in the eligible fields.
 - 4. Payments and Interest - During the time a recipient qualifies for any of the deferments described in item a), the recipient need not make the scholarship repayments and the interest does not accrue.
 - 5. Waiver - The Office of Student Financial Assistance shall waive a recipient's grant repayment obligations if it determines:
 - a. on the basis of a sworn affidavit of a qualified physician, that the recipient is unable to perform the service obligation on a full-time basis because of an impairment that is expected to continue indefinitely or result in death; or
 - b. on the basis of a death certificate or other evidence of death that is
 - c. conclusive under State law, that the recipient has died.

O. FUNDING

Notwithstanding the specific language in any of the award programs regarding the amount or number of awards, the funding for all programs shall be as provided ~~in~~for in the ~~annual State~~ budget ~~of the Commission~~ and all awards are contingent on the continued availability of such funding.

MARYLAND HIGHER EDUCATION COMMISSION

OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR THE

PROGRAM OF ECONOMIC DEVELOPMENT
STUDENT ASSISTANCE GRANTS

Nursing

APPROVED: JUNE 2001
REVISED AND SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION
Office of Student Financial Assistance

Guidelines for the
Program of Economic Development Student Assistance Grants

NURSING

This program is subject to the general provisions of section .01 of these guidelines and to the statutory authority in §18-706 of the Education Article, Annotated Code of Maryland.

A. PURPOSE

The purpose of this grant under the Program of Economic Development Student Assistance Grants is to attract qualified students into the field of nursing, and to assist eligible nursing recipients in meeting living expenses if they demonstrate financial need.

B. ELIGIBILITY

Individuals must have a cumulative 3.0 grade point average on a 4.0 scale from high school or postsecondary course work (minimum of 12 credit hours), attend a Maryland college or university that awards a nursing degree, or has an articulation agreement with an institution that awards a nursing degree; and be enrolled in a program that leads to a nursing degree. Individuals must enroll for a minimum of six credits each semester.

Applicants whose cumulative grade point average is below 3.0 and is based, entirely or in part, on postsecondary course work taken more than 5 years prior to application may request to have their grade point average recalculated to exclude the course work taken more than 5 years prior to application.

To be eligible for a living expenses grant, an applicant must be holding a nursing grant, have filed a Free Application for Student Financial Aid (FAFSA) by the March 1 deadline and demonstrate financial need.

A recipient of the nursing grant may hold any State grant or scholarship issued by the Office of Student Financial Assistance as long as:

1. eligibility requirements are met for each scholarship and grant received; and

2. the total of all scholarships and grants does not exceed:
 - a. the student's total cost of education as certified by the institution the student is attending; ~~and~~or
 - b. the equivalent annual expenses of a full-time resident undergraduate at the 4-year public institution of higher education within the University System of Maryland, other than the University of Maryland University College and the University of Maryland, Baltimore, with the highest annual expenses for a full-time resident undergraduate.

C. AWARD AMOUNT

The nursing grant is in the amount of tuition and mandatory fees, not to exceed \$3,000 per academic year. It is renewable on an annual basis for a maximum amount of \$12,000.

Nursing students enrolled in a program that includes mandatory summer academic sessions shall be awarded the amount of tuition and fees not to exceed \$4,500 per calendar year.

The living expenses grant is based on a percentage of demonstrated financial need, and may not exceed \$3,000 per academic year. It is renewable on an annual basis up to a maximum amount of \$12,000. Award amounts are subject to change in accordance with the recipient's demonstrated financial need and available funds.

D. APPLICATION PROCEDURES

Completion of a specific application is required for the nursing grant. Applications are available from directors and deans of nursing programs, financial aid offices at eligible Maryland institutions and the Office of Student Financial Assistance.

Completion of the FAFSA by the March 1 deadline is required for priority consideration of the living expenses grant. A form may be obtained from financial aid offices, local libraries and the Office of Student Financial Assistance.

Students applying for the first time must provide:

1. a completed application;
2. an official transcript from the most recent postsecondary institution which he or she has attended. If applicant has earned less than 12 credit hours at the institution most recently attended, then he or she may submit official transcripts from previous colleges; or

3. an official high school transcript if an applicant has earned less than 12 college level credits; and
4. proof of official acceptance into the nursing program from the institution.

E. QUALIFICATION AND SELECTION OF RECIPIENTS

Eligible new applicants are categorized by enrollment status as follows:

1. official enrollment in a ~~registered~~ nursing program at a 2-year or 4-year postsecondary institution or hospital, and completion of at least twelve credits in a nursing program;
2. ~~enrollment in a pre-nursing curriculum, or e~~Completion of less than twelve credits in a nursing program;
3. graduation from high school or enrolled in postsecondary course work with no college credits; and
4. ~~enrollment in the following programs: Registered Nursing Bachelor of Science in Nursing, Registered Nursing Master of Science in Nursing, Bachelor of Science in Nursing, or Master of Science in Nursing programs~~; enrollment in a graduate nursing program.

Once students have been divided into enrollment categories, each will be ranked according to cumulative GPA within that group. Group 1 has the highest priority; Group 3 the lowest. Group 4 is awarded separately.

The funds will be awarded in the following manner:

1. all eligible renewals are awarded first;
2. 10 percent of the scholarship portion of the budget is set aside to award to Group 4 applicants; and
3. remaining funds are distributed in proportion to applicant pool for categories 1 through 3. Students in each category are awarded until funds are expended.

The percentage of the budget allotted to award the living expenses grant will be determined on an annual basis. The awards will be based on a percentage of a recipient's demonstrated financial need.

F. PAYMENT

The nursing grant is estimated on the student's award letter. The award will be adjusted by the student's institution to reflect the actual dollar amount of tuition and mandatory fees up to the maximum award of \$1,500 per semester.

G. RENEWAL AND CONTINUATION

The Nursing Scholarship is automatically renewed on an annual basis. Rosters are sent to institutions to verify the recipients' annual grade point average. For renewal, the recipient must meet the following criteria:

1. is a Maryland resident;
2. remains enrolled in an eligible institution;
3. maintains a 3.0 annual grade point average on a 4.0 grade point average scale (includes Fall and Spring grades for previous academic year);
4. makes satisfactory academic progress according to the institution's standards; and
5. continues to meet all other eligibility requirements as stated in Section B.

A nursing grant will NOT be automatically renewed if the recipient's award is cancelled for any reason during the prior academic year or if the recipient has an annual grade point average below 3.0.

A recipient who is academically ineligible will forfeit the award. If funds are available, the award may be reinstated upon proof that the student achieved a 3.0 grade point average in the fall or spring semesters in the academic year following the cancellation of the award. Courses taken in summer school may be considered in calculating a student's annual grade point average.

H. SERVICE OBLIGATION

The recipient is required to provide nursing care on a full-time basis at an eligible employment organization in a critical shortage area in the State, one year for each academic year tuition assistance was received. Full-time employment is defined by the employing agency.

An eligible organization is a licensed hospital, adult day care center, nursing home, public health agency, home health agency, or other organization authorized by the Secretary of Health and Mental Hygiene.

I. TRACKING OF GRADUATED RECIPIENTS

Upon graduation from the initial nursing program, all recipients must inform the Office of Student Financial Assistance of future plans regarding employment or further education. A recipient must complete a questionnaire provided by the Office of Student Financial Assistance and if employed, further verification is then obtained from the employer's personnel office. Failure to return this questionnaire will invoke repayment of the scholarship.

MARYLAND HIGHER EDUCATION COMMISSION
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR THE

PROGRAM OF ECONOMIC DEVELOPMENT
STUDENT ASSISTANCE GRANTS

Physical and Occupational Therapists
and Physical and Occupational Therapy Assistants

APPROVED: SEPTEMBER 14, 1994
REVISED AND SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION
Office of Student Financial Assistance

Guidelines for the
Program of Economic Development Student Assistance Grants

**PHYSICAL AND OCCUPATIONAL THERAPISTS AND
PHYSICAL AND OCCUPATIONAL THERAPY ASSISTANTS**

This program is subject to the general provisions of section .01 of these guidelines and to the statutory authority in §18-704 of the Education Article, Annotated Code of Maryland.

A. PURPOSE

The purpose of this grant under the Program of Economic Development Student Assistance Grants is to reduce the severe shortage of physical and occupational therapists and assistants trained to work with certain handicapped children placed in public schools in Maryland or certain non-public education programs or, if certain conditions are met, for providing service in designated State therapeutic hospitals.

B. ELIGIBILITY

A recipient of assistance under this section must be enrolled full-time at an eligible institution in Maryland in a program leading to licensure in Maryland as a physical therapist, physical therapy assistant, occupational therapist, or occupational therapy assistant.

C. AWARD AMOUNT

The annual amount of the grant per recipient may not exceed \$2,000. The tuition assistance may be applied to tuition charges, fees, room, board, or other related educational expenses.

D. APPLICATION PROCEDURES

A specific application for this program is available from financial aid offices at eligible Maryland institutions or from the Office of Student Financial Assistance. The application deadline is July 1. In addition to the application the applicant must provide:

1. an official transcript of the student's secondary school course work; or
2. an official transcript or transcripts showing all college course work; and

3. a statement of enrollment in or admission to an eligible institution and in a program leading to licensure in Maryland as a physical therapist, physical therapist assistant, occupational therapist or occupational therapist assistant.

E. SELECTION OF RECIPIENTS

Recipients will be selected by the Office of Student Financial Assistance based on academic ability as reflected in secondary school or college grade point average. Students in freshmen entry programs will be evaluated on the basis of the secondary school record. Students in advanced level entry programs will be evaluated on the basis of the college record.

At least 25 annual awards under this section shall be made to students who agree to provide physical or occupational therapy to handicapped children in a public school in Maryland or to handicapped children placed in an approved non-public education program.

F. PAYMENT

At the beginning of each school term, eligible institutions shall certify on billing rosters that the recipient is a full-time student that semester or term and enrolled in an eligible program.

A full-time internship program as defined by the college or university is considered full-time enrollment for purposes of payment. Upon receipt of the institution's certification, the Office of Student Financial Assistance will pay the appropriate amount of money to the institution to be credited to the student's account. Payment for summer courses can be made if the student requests it in advance, but such payment will reduce the amount of money which can be paid during the fall or spring semesters, or both, and all payments for a student cannot exceed the maximum award amount during a fiscal year (July 1 to June 30).

G. RENEWAL AND CONTINUATION

Renewal is automatic for the period required to complete the eligible program if the recipient ~~reapplies annually and continues~~ to meet the eligibility requirements, including satisfactory academic progress at the institution.

H. SERVICE OBLIGATION

The recipient is obligated to provide physical or occupational therapy to handicapped children in a public school in Maryland or to handicapped children placed in an approved non-public education program or to provide physical or occupational therapy in a State therapeutic hospital determined by the Secretary of Health and Mental Hygiene to have a severe shortage of physical or occupational therapists.

The first year of service in an educational setting must be provided under the full-time on-site supervision of a licensed physical or occupational therapist who has at least 2 years' experience in a school program. The recipient may provide the service in an educational setting either through direct employment or through contractual arrangement with the local educational agency.

To be considered an approved non-public education program, the program must meet the requirements found in the Education Article of the Annotated Code of Maryland, §8-409.

I. TRACKING OF GRADUATED RECIPIENTS

Upon completion of the approved program, all recipients are required to inform the Office of Student Financial Assistance of future plans regarding employment or further education. If employed, the recipient must provide the name and address of the employer to the Office of Student Financial Assistance; the Administration will contact the employer directly for verification that the conditions of the grant are being met. This verification must be provided annually until the required years of service are completed. Failure to complete and return the form will invoke the repayment obligation.

MARYLAND HIGHER EDUCATION COMMISSION
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES
FOR THE
PROGRAM OF ECONOMIC DEVELOPMENT
STUDENT ASSISTANCE GRANTS

Sharon Christa McAuliffe Memorial
Teacher Education Award

APPROVED: JULY, 2000
REVISED AND SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION
Office of Student Financial Assistance

Guidelines for the
Program of Economic Development Student Assistance Grants

SHARON CHRISTA MCAULIFFE MEMORIAL TEACHER EDUCATION AWARD

This program is subject to the general provisions of section .01 of these guidelines and to the statutory authority in §18-703 of the Education Article, Annotated Code of Maryland.

A. PURPOSE

The purpose of this grant under the Economic Development Student Assistance Grants Program is to reduce the shortage of teachers in Maryland by assisting eligible persons to gain certification as teachers in areas of critical teacher shortage as declared annually by the State Board of Education. Recipients of this grant are required to teach in the public schools of this State in the certification field for which the award was offered.

B. ELIGIBILITY

To be eligible for an award a person shall qualify as follows:

1. Applicants without a prior bachelors degree shall have earned 60 undergraduate credits by the beginning of the first award year and have at least a 3.0 cumulative grade point average on a 4.0 scale;
2. Applicants with a prior degree shall hold a bachelor's or higher degree and have at least a 3.0 cumulative grade point average on a 4.0 scale for their most recent degree; or
3. Teacher applicants shall be nominated as applicants by the Superintendent of the public school system in which the applicants teach or intend to teach, who are not employed or certified as teachers in critical shortage areas, and have at least a 3.0 cumulative grade point average on a 4.0 scale for their most recent degrees.

All eligible applicants shall be seeking Maryland teacher certification in an area of critical or geographic teacher shortage as declared annually by the Maryland State Board of Education and shall be enrolled in or accepted for enrollment in an eligible institution as defined in Education Article § 18-703(a)(2).

C. APPLICATION PROCEDURES

Applications are accepted each year from November 1st through December 31st for awards beginning in the following academic year.

Applicants are required to submit a completed application, official copies of college transcripts, a writing sample, and a resume.

Applications are available in late October from the Office of Student Financial Assistance for all three types of applicants. In addition, applicants without a prior bachelors degree may obtain an application from the financial aid and transfer counselors' offices of Maryland colleges and universities. Applications for teacher applicants are available from the central offices of Maryland local education authorities, usually the personnel or staff development office.

D. AWARD AMOUNT

The annual amount of the grant per recipient is as follows:

1. Full-time recipients living on campus in college housing shall receive an award of the actual dollar amount charged by the eligible institution attended for tuition, mandatory fees, and room and board, up to the equivalent annual expenses of a full-time resident undergraduate at the 4-year public institution of higher education within the University System of Maryland, other than the University of Maryland University College and the University of Maryland, Baltimore, with the highest annual expenses for a full-time resident undergraduate; or
2. Full-time recipients living off-campus shall receive an amount equal to the actual charges for tuition and mandatory fees plus a stipend for living expenses as established by the OSFA each year up to a maximum of the equivalent annual expenses of a full-time resident undergraduate at the 4-year public institution of higher education within the University System of Maryland, other than the University of Maryland University College and the University of Maryland, Baltimore, with the highest annual expenses for a full-time resident undergraduate.
3. Part-time recipients shall receive an award of the actual dollar amount charged by the eligible institution attended for tuition and mandatory fees up to a maximum of these costs for a part-time, in-state undergraduate student at the 4-year public institution of higher education within the University System of Maryland, other than the University of Maryland University College and the University of Maryland, Baltimore, with the highest annual expenses for a full-time resident undergraduate; and

4. Special fees assessed for practice/student teaching shall be treated as mandatory fees and shall be added to the amount of the award as determined above.

E. SELECTION OF RECIPIENTS

Recipients shall be selected on a competitive basis from among all eligible applicants by the Office of Student Financial Assistance based on recommendations of a committee of professional staff from the Division of Instruction and the Division of Certification and Accreditation of the State Department of Education on the basis of:

1. cumulative collegiate grade point average including any transfer credits accepted by the school attended;
2. applicable work experience as reflected in a resume to be submitted as part of the application process;
3. a writing sample; and
4. quality of academic background in teacher certification field.

F. PAYMENT

At the beginning of each school term, eligible institutions shall certify the recipient's full-time or part-time status, enrollment into the appropriate program of teacher education, and the amount of the award. Upon receipt of that information, payment will be made directly to the institution, to be credited to the student's account. Student/practice teaching is considered to be full-time enrollment.

~~The award amount for this grant is shown as \$1.00 on the award letter and Billing Roster. Postsecondary institutions are to adjust the \$1.00 to reflect actual award amounts.~~
The award amount is estimated based on self-reported enrollment status. Awards will be adjusted by the student's institution to reflect the actual dollar amount of the tuition and mandatory fees up to the maximum as described in Section D.

G. RENEWAL AND CONTINUATION

A grant may be renewed for one school year provided the recipient ~~applies for award renewal~~, is continuing in the appropriate teacher education program at an eligible postsecondary institution leading to teacher certification in the field for which the award was offered, and has maintained an annual grade point average of at least 3.0 on a 4.0 scale.

H. SERVICE OBLIGATION

Upon completion of the course or program requirements for teacher certification in the area for which the award was given and the passage of any test or examination required for teacher certification, recipients of awards are obligated to teach in the certification field for which the award was given on a full-time basis in a public school in this State for a period of 1 academic year for each academic year or portion thereof that a payment of tuition assistance was made.

I. TRACKING OF GRADUATED RECIPIENTS

Upon completion of teacher certification, all recipients must inform the Office of Student Financial Assistance of future plans regarding employment or further education. Until the service obligation is completed, recipients are required to complete an annual questionnaire provided by the Administration. Failure to submit a completed annual questionnaire will invoke repayment of all or a portion of the scholarship amount plus interest.

J. SERVICE OBLIGATION OF RECIPIENTS PRIOR TO JULY 1, 1991

Recipients of tuition assistance under this program who received payment for courses taken prior to July 1, 1989, shall be obligated to a service obligation of 1 1/2 years of teaching for each year or portion thereof in which a payment was made regardless of whether they attended on a full-time or part-time basis, except that the length of the service obligation shall be reduced by one-third if they accept a teaching position in a geographic region of extraordinary teacher shortage as defined in § 18-1406 of the Education Article, Annotated Code of Maryland.

Recipients of tuition assistance under this program who received payment for courses taken after June 30, 1989, and before July 1, 1991, shall be obligated for each year or portion thereof that a payment was made to a service obligation of 1 1/2 years if they attended on a full-time basis and for 1 year if they attended on a part-time basis, except that an obligation of only 1 year shall be required, regardless of whether they attended on a full-time or part-time basis, if they teach in a geographic area of extraordinary teacher shortage as stated in § 18-1404 and 18-1406 of the Education Article, Annotated Code of Maryland.

MARYLAND HIGHER EDUCATION COMMISSION
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES
FOR THE
SCIENCE AND TECHNOLOGY SCHOLARSHIP

APPROVED: JUNE 2002
REVISED & SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION

Office of Student Financial Assistance

Guidelines for the Maryland Science and Technology Scholarship

AUTHORITY

The Maryland Science and Technology Scholarship program was enacted into law by the Maryland General Assembly (Annotated Code of Maryland - Education Article Section 18-2001) in 1998. Under law (Annotated Code of Maryland - Education Article Section 18-204), the Maryland Higher Education Commission has the authority to establish regulations for the administration of this program.

A. PURPOSE

The purpose of the Maryland Science and Technology Scholarship is to assist in meeting the State's need for well trained and highly skilled workers in shortage areas. Students who perform well academically in high school and agree to use their training in eligible programs as members of Maryland's workforce qualify for scholarship assistance.

B. ELIGIBILITY

To be eligible for assistance under the Maryland Science and Technology Scholarship program, an applicant must meet the following general requirements:

1. be a Maryland resident;
2. be a U.S. citizen or eligible non-citizen;
3. graduate from a secondary school;
4.
 - a. have an un-weighted cumulative grade point average of at least 3.0 on a 4.0 scale or its equivalent in core curriculum courses after the completion of the first semester of the senior year;
 - b. beginning in academic year 2003-2004 have an overall grade point average of at least 3.0 on a 4.0 scale or its equivalent after the —completion of the first semester of the senior year if applying as a high school student.

- c. have a cumulative grade point average of at least 3.0 on a 4.0 scale or its equivalent in college courses if applying as a college undergraduate.
- 5. is enrolled, or intends to enroll, or is accepted as a full-time undergraduate student in an eligible academic program at a Maryland higher education institution;
- ~~6. be accepted for admission in a regular undergraduate program at a Maryland higher education institution; or~~
- ~~7. be enrolled as a full-time student at an eligible institution pursuing a course of study or program in an eligible program and have an unweighted cumulative grade point average in college of at least 3.0 on a 4.0 scale or its equivalent at the time of application;~~
- ~~68.~~ begin college within 5 years of completing high school;
- ~~79.~~ submit an appropriately completed Maryland Science and Technology Scholarship application with an official transcript to the Office of Student Financial Assistance by March 1; and
- ~~840.~~ agree to perform the required service or repay the State if the service obligation is not performed.

C. APPLICATION PROCESS

Students must apply for a Science and Technology Scholarship by completing the application form provided by the Office of Student Financial Assistance. Applications completed by high school students will be submitted to the Office of Student Financial Assistance by the designated high school official. The high school will provide for each applicant an official high school transcript reflecting high school grades through the first semester of the senior year and a grade point average calculated according to directions provided by the Office of Student Financial Assistance (see B.4.). College level applicants must forward official transcripts from all institutions attended. Applications must be received by the Office of Student Financial Assistance by March 1.

D. ELIGIBLE ACADEMIC PROGRAMS

The Maryland Higher Education Commission shall annually, by June 1, establish a list of academic programs eligible for the Maryland Science and Technology Scholarship Program. This list shall be established by consulting with the Department of Business and Economic Development, the Department of Labor, Licensing, and Regulation and the appropriate Commission advisory boards. The Commission shall take

into account such factors as economic growth and the needs of Maryland's science and technology industry and business community.

Students currently receiving the Maryland Science and Technology Scholarship would be allowed to change their major to another major deemed eligible by the Commission for this scholarship program. The service obligation would require the student to work in the State in the career field in which he/she graduated for the total number of years he/she received a Science and Technology Scholarship.

In any year in which an area is determined by the Commission to no longer be an area of critical shortage, no additional new awards will be made in that area. Awards will be renewed for qualified students who received an initial award prior to this determination.

E. AWARD AMOUNT

The award amount will be \$3,000 for students enrolled at 4-year higher education institutions and \$1,000 for students enrolled at 2-year higher education institutions. The scholarship ~~can only~~ may be used for tuition and mandatory fees.

F. SELECTION OF RECIPIENTS

Eligible applicants will be placed in rank order on the basis of cumulative grade point average. The grade point average is calculated on a 4.0 scale. Courses are not weighted based on degree of difficulty and values for plus or minus grades for high school students are not used. If letter grades are not reported by a school, a letter grade will be assigned to each numeric interval the school uses and a grade point average on a 4.0 scale will be computed. High School applicants will be selected based on a statewide ranking of the student's cumulative grade point average, beginning with the highest grade point average, up to the total amount that has been appropriated for the program. Currently enrolled college applicants will be ranked by grade point average and selected after high school applicants have been awarded.

G. AWARD NOTIFICATION

Recipients will be notified in writing of the scholarship award. In order to accept an award, the recipient must provide written acceptance of the award and must sign a promissory note and submit both to the Office of Student Financial Assistance by the date specified in the award notice.

H. RENEWAL AND CONTINUATION

A Science and Technology Scholarship may be renewed if the recipient:

1. remains a resident of the State of Maryland;

2. remains enrolled in an eligible institution;
3. enrolls in an eligible academic program;
4. remains enrolled as a full-time student for each semester;
5. maintains a 3.0 annual grade point average;
6. makes satisfactory academic progress towards a degree according to the institutions standards; and
7. maintains the standards of the institution.

If meeting the above eligibility requirements, an award for a student enrolled in an associate degree program may be renewed on an annual basis for 1 year and an award for a student enrolled in a baccalaureate degree program may be renewed on an annual basis for 3 years. If a student is enrolled in a baccalaureate degree program that, as determined by the institution, requires 5 years to complete, an award may be renewed for 4 years if the recipient meets all other eligibility requirements.

A student transferring from one institution to another can continue to receive the award as long as he/she meet all of the eligibility requirements.

Following the spring semester, the Office of Student Financial Assistance will request the postsecondary institution provide a certified annual grade point average for the academic year for the Science and Technology Scholarship recipients attending that institution. The grade point average will be computed using the procedures in use by the institution. The institution's calculation of the grade average is final. The OSFA does not round any reported grade point averages. If the reported calculation is below a 3.0, the recipient's Science and Technology Scholarship will not be renewed. The OSFA also may ask the school to verify the recipient's grade point average by submitting an official transcript.

If the institution cannot compute a grade point average for the academic year, it must submit a grade point average for each semester the student was enrolled during the academic year. If either semester average is below a 3.0, the college must report the number of hours attempted and the number of hours completed for the semesters in which the student is enrolled.

A recipient whose award has been canceled may request reinstatement of the scholarship if the academic performance in summer school immediately following the academic year for which the scholarship was received raises the grade point average to 3.0 or above.

A recipient whose award has been canceled may request reinstatement of the scholarship after the student's grade point average for the subsequent academic year is once again 3.0 or higher. If the student fails for a second time to maintain a grade point average of 3.0, the award is canceled and may not be reinstated.

I. REVOCATION OF AWARD

The Maryland Science and Technology Scholarship is canceled if the student:

1. ceases to be a Maryland resident;
2. fails to enroll at a Maryland higher education institution in an eligible program;
3. fails to enroll as a full-time student and takes less than 12 credit hours each semester or its equivalent;
4. does not earn a 3.0 annual grade point average;
5. fails to make satisfactory academic progress towards a degree; or
6. fails to maintain the standards of the institution.

J. PAYMENT

Each semester, eligible institutions shall certify on billing rosters provided by the Office of Student Financial Assistance that the recipient:

1. is a Maryland resident;
2. is enrolled in an eligible academic program;
3. is enrolled for 12 or more hours as an undergraduate student; and
4. is making satisfactory academic progress towards a degree; and
5. maintains the standards of the institution.

K. SERVICE OBLIGATION

Recipients are required to begin employment in the State within one year after completion of undergraduate studies. The recipient is required to perform the service obligation for one year for each year, or portion thereof, that the recipient received a

scholarship. The employment must be in an occupation directly related to the eligible program of study. On the forms provided by the Office of Student Financial Assistance, the employing or contracting agency or approved employer must certify annually that the recipient is performing the service requirement in the manner prescribed.

The service obligation begins after graduation and cannot be fulfilled prior to graduation.

A recipient of the Science and Technology Scholarship who also receives additional service related awards may not fulfill the required service obligations of the scholarships concurrently. The recipient must fulfill the service obligation for the Science and Technology Scholarship in addition to the service obligation for the additional awards, one year for each year or partial year that the recipient received each award

L. REPAYMENT

A recipient will be required to repay the State if the recipient:

1. has the award revoked;
2. fails to receive the appropriate degree;
3. fails to complete the annual questionnaire on performance of service obligation;
4. fails to perform the service obligation for the required amount of time; or
5. otherwise fails to carry out the obligations of the scholarship.

Interest on the funds advanced is an interest rate equal to and matching the interest rate established by the United States Department of Education for the Federal Stafford Loan on the first day of July of each year (enacted by the Maryland General Assembly October 1, 2000), with interest not accruing prior to notification to the Commission of a recipient's graduation or termination from an institution of higher education. Repayment of the grant is waived at the rate of one academic year for each calendar year the recipient performs the service obligation. The repayment schedule is established by the Office of Student Financial Assistance, and payment must be completed within 6 years after repayment begins.

M. DEFERMENT OR WAIVER OF THE SERVICE OBLIGATION AND REPAYMENT

1. It is the intention of the Office of Student Financial Assistance (OSFA) that the recipient will seek employment aggressively in all regions of the State in which eligible employment opportunities exist in the eligible fields.

A recipient may receive a deferment during the time the recipient is:

- a. enrolled in a full-time undergraduate course of study at an institution of higher education in a degree granting program for a period not to exceed twelve months;
- b. enrolled in an academic or a professional program that leads to a certificate or advanced degree which is relevant to employment in a science and technology occupation for a period not to exceed five years from the date the student earned an undergraduate degree;
- c. on a temporary leave of absence approved by the employer or the OSFA from full-time employment in the required employment field for a period not to exceed twelve months;
- d. temporarily totally disabled, for a period not to exceed three years;
- e. unable to secure employment for a period not to exceed twelve months by reason of the care required by a spouse or child who is disabled; or
- f. seeking and unable to find the required employment for a single period not to exceed 12 months.

To qualify for any of the deferments a recipient shall notify the Office of Student Financial Assistance, and the Central Collection Unit if the repayment period has begun, of the recipient's claim for the deferment and provide supporting documentation. Such documentation shall consist of:

- a. certification by the college's office of the registrar if the recipient has returned to a full-time course of study at an eligible institution of higher education;
- b. certification by the employer that the recipient is on a temporary approved leave of absence from the required employment;
- c. a sworn affidavit of a qualified physician that the recipient is temporarily totally disabled;
- d. a sworn affidavit of a qualified physician if the recipient is unable to find employment by reason of the care required by spouse or child who is disabled;

- e. a certified statement including a list of possible eligible employers with their addresses and telephone numbers to which application has been made if the recipient has been unable to find full-time employment in the required field.
- 2. The Office of Student Financial Assistance shall review all documentation to determine whether the deferment conditions have been met and, if so, for what time periods. Before a deferment based on inability to find employment in the eligible field is granted, the Office of Student Financial Assistance will review the submitted documentation and any other information available to it for evidence that the recipient has sought employment aggressively in all regions of the State in which eligible employment opportunities exist in the eligible fields.

During the time a recipient qualifies for any of the deferments described in item 1, the recipient need not make the scholarship repayments and the interest does not accrue.

- 3. The Office of Student Financial Assistance shall waive a recipient's grant repayment obligations if it determines:
 - a. on the basis of a sworn affidavit of a qualified physician, that the recipient is unable to perform the service obligation on a full-time basis because of an impairment that is expected to continue indefinitely or result in death; or
 - b. on the basis of a death certificate or other evidence of death that is conclusive under State law, that the recipient has died.

N. APPEALS

1. Categories of Appeals

Science and Technology recipients can appeal their eligibility for an award for the following criteria:

- a. be enrolled as a full-time student and take at least 12 semester hours of courses each semester or its equivalent: Students enrolled for less than 12 credits can still be considered eligible for the Science and Technology Scholarship if they are participating in a specific course or activity (such as an internship or a practicum) that is required by the institution to complete their academic program. To be considered full-time, the actual time spent in the classroom, lab, supervised activity or clinic must equal 180 clock

hours or more in a regular semester. The student must be enrolled for a minimum of 6 credit hours.

- b. maintenance of a 3.0 annual grade point average: If a student should fail to meet this requirement, satisfactory evidence as specified below must be presented to OSFA of extenuating circumstances that prevented the student from achieving the required GPA.
- c. applicants having less than a 3.0 GPA in high school core curriculum may appeal the ineligibility in writing to the Director of the Office of Student Financial Assistance. The written appeal should detail reasons and/or circumstances that would justify reversal of the decision, including all appropriate documentation. The Director will review each case and make a decision based on the written materials submitted. All decisions of the Director are final.

2. Appeal Procedures

The student must complete an appeal form provided by the Office of Student Financial Assistance. In completing the appeal form, the student must document the conditions upon which the appeal is based as specified below. Upon receipt of the appeal, the documentation will be reviewed and a decision will be rendered. The student will be notified of the outcome of the appeal in writing.

- a. (full-time equivalency) If a student is enrolled in a specific course or activity (such as an internship or a practicum) that is required by the institution to complete their academic program that results in the student being enrolled for less than 12 credit hours, the student may appeal for consideration for an award. In addition to the appeal form, the student must submit documentation which includes a statement from the student's department chair that describes the program requirements for that semester and a catalog description of the program and classes involved. The documentation shall also list the number of clock hours required for each activity.
- b. (grade point average) The following circumstances are considered acceptable as grounds for an appeal:
 - (1) serious illness or injury of the student;

- (2) serious illness of a member of the student's immediate family;
- (3) serious personal emotional difficulties of the student;
- (4) death of a member of the student's immediate family; or
- (5) other serious personal circumstances.

O. FUNDING

The funding for the Maryland Science and Technology Scholarship shall be as provided in the annual budget of the Commission and all awards are contingent upon the continued availability of such funding.

MARYLAND HIGHER EDUCATION COMMISSION

OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR THE

MARYLAND TEACHER SCHOLARSHIP

APPROVED: JUNE 2002

REVISED & SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION

Office of Student Financial Assistance

Guidelines for the Maryland Teacher Scholarship

AUTHORITY

The Maryland Teacher Scholarship program was enacted into law by the Maryland General Assembly (Annotated Code of Maryland - Education Article Section 18-2201) in 1999. Under law (Annotated Code of Maryland - Education Article Section 18-204), the Maryland Higher Education Commission has the authority to establish regulations for the administration of this program.

A. PURPOSE

The purpose of the Maryland Teacher Scholarship is to assist in meeting the State's need for well-trained and highly skilled teachers by assisting eligible persons to gain certification as teachers in the State. Students who perform well academically and agree to use their training in public schools as elementary or secondary school teachers qualify for scholarship assistance.

B. ELIGIBILITY

Due to the immediate need for certified teachers in shortage areas, for the 1999-2000 academic year college seniors and graduate students only are eligible for Maryland Teacher Scholarship assistance. In subsequent years, high school seniors and all college students pursuing teacher certification will be eligible for assistance under the Maryland Teacher Scholarship program.

1. To be eligible for assistance under the Maryland Teacher Scholarship program for the 1999-2000 academic year, an applicant must meet the following general requirements:
 - a. be a Maryland resident;
 - b. be a U.S. citizen or eligible non-citizen
 - c. be a full-time enrolled college senior at an eligible institution pursuing a course of study or program in an academic discipline leading to a Maryland professional teacher's certificate; or

- d. be enrolled as a full-time graduate student at an eligible institution pursuing a course of study or program in an academic discipline leading to a Maryland professional teacher's certificate;
 - e. have an unweighted cumulative grade point average in college of at least 3.0 on a 4.0 scale or its equivalent at the time of application;
 - f. have been making satisfactory progress toward a degree in an academic discipline leading to a Maryland professional teacher's certificate;
 - g. submit a completed Maryland Teacher Scholarship application to the Office of Student Financial Assistance by July 31, 1999; and
 - h. agree to perform the required service obligation as an elementary or secondary school teacher in a Maryland public school or repay the State that portion of the service obligation not performed.
2. To be eligible for assistance under the Maryland Teacher Scholarship program for academic years 2000-2001 and beyond, an applicant must meet the following general requirements:
- a. be a high school senior or college student at the time of application;
 - b. graduate from a secondary school;
 - c. be a Maryland resident;
 - d. be a U.S. citizen or eligible non-citizen.
 - ed. (1) have an un-weighted cumulative grade point average of at least 3.0 on a 4.0 scale or its equivalent in core curriculum courses after the completion of the first semester of the senior year;
 - (2) beginning in academic year 2003-2004 have an overall grade point average of at least 3.0 on a 4.0 scale or its equivalent after the completion of the first semester of the senior year.
 - fe. Applying college students must have a 3.0 cumulative grade point average. The grade point average will only be calculated based on

completed college course work. Cumulative grade point average for applying graduate students who have completed graduate course work will be calculated based only on completed graduate course work.

- gf. Enroll as a full-time or part-time undergraduate or graduate student in an academic program leading to professional teacher certification; ~~or~~
- hg. begin college within 2 years of completing high school if applying as a high school senior;
- ih. submit a completed Maryland Teacher Scholarship application to the Office of Student Financial Assistance by March 1; and
- ji. agree to perform the required service as an elementary or secondary school teacher within the Maryland public school system or repay the State that portion of the service obligation not performed.

C. APPLICATION PROCESS

Students must apply for a Maryland Teacher Scholarship by completing the application form provided by the Office of Student Financial Assistance. Applications completed by students will be submitted to the Office of Student Financial Assistance. For applying high school seniors the high school will provide an official transcript reflecting grades through the first semester of the year of application and a cumulative grade point average in ~~the~~ overall coursework. ~~All other e~~College students will provide an official academic transcript from each college attended. Graduate students who have completed graduate level work should submit those transcripts only. Applications must be received by the Office of Student Financial Assistance by March 1.

D. AWARD AMOUNT

The annual award amount is \$5,000 for a full-time student enrolled at a 4-year higher education institution and \$2,000 for a full-time student enrolled at 2-year higher education institution. A part-time undergraduate or graduate student attending a 4-year institution will receive \$2,500 annually. A part-time undergraduate attending a 2-year college will receive \$1,000 per year. The scholarship may be used for tuition and mandatory fees.

E. SELECTION OF RECIPIENTS

1. For the 1999-2000 academic year eligible applicants will be placed in rank order on the basis of cumulative grade point average. The grade point average is calculated on a 4.0 scale. Courses are not weighted based on

degree of difficulty, and values for plus or minus grades are not used. If letter grades are not reported by a school, a letter grade will be assigned to each numeric interval the school uses and a grade point average on a 4.0 scale will be computed. Recipients will be selected based on a statewide ranking of the student's cumulative grade point average, beginning with the highest grade point average, up to the total amount that has been appropriated for the program.

2. For the academic years 2000-2001 and 2001-2002, eligible applicants will be placed into one of two groups:
 - a. College sophomores, juniors, seniors, and graduate students, defined as students who have completed at least 28 credit hours. This group will receive 65% of awards.
 - b. High school seniors and college freshmen, defined as undergraduate students who have completed less than 28 credit hours. This group will receive 35% of awards.
3. For years subsequent to the 2001-2002 academic year, eligible applicants will be placed into one of three groups:
 - a. full-time sophomores, juniors, seniors, and graduate students, defined as students who have completed at least 28 credit hours and will enroll on a full-time basis. This group will receive approximately 60% of available funds based on the eligible applicant pool.
 - b. High school seniors and college freshmen, defined as students who have completed fewer than 28 credit hours and will enroll on a full-time basis. These students will receive approximately 30% of available funds based on the eligible applicant pool.
 - c. Part-time undergraduate and graduate students will be ranked by the number of credits, which have been completed. These students will receive approximately 10% of the available funds based on the eligible applicant pool.

Eligible applicants in each group will be placed in rank order on the basis of cumulative grade point average. Recipients will be selected based on a group-wide ranking of the student's cumulative grade point average, beginning with the highest grade point average.

F. AWARD NOTIFICATION

Recipients will be notified in writing of the scholarship award. In order to accept an award, the recipient must provide written acceptance of the award and must sign a promissory note and submit both to the Office of Student Financial Assistance by the date specified in the award notice.

G. RENEWAL AND CONTINUATION

A Maryland Teacher Scholarship may be renewed if the recipient:

1. remains a resident of the State of Maryland;
2. remains enrolled in an eligible institution;
3. remains enrolled in an eligible academic program leading to a Maryland professional teacher's certificate;
4. remains enrolled as a full-time or part-time undergraduate or graduate student for each semester;
5. maintains a minimum 3.0 cumulative grade point average;
6. makes satisfactory academic progress towards a degree according to the institutions standards; and
7. maintains the standards of the institution.

If meeting the above eligibility requirements, an award for a student enrolled in an associate degree program may be renewed on an annual basis for 1 year. If a student is enrolled in an associate degree program that, as determined by the college, requires 3 years to complete, an award may be renewed for 2 years.

An award for a student enrolled in a baccalaureate or graduate level degree program may be renewed on an annual basis for 3 years. If a student is enrolled in a baccalaureate degree program that, as determined by the institution, requires 5 years to complete, an award may be renewed for 4 years if the recipient meets all other eligibility requirements.

A student transferring from one institution to another can continue to receive the award as long as they meet all of the eligibility requirements.

Following the spring semester, the Office of Student Financial Assistance will request the postsecondary institution to provide a certified cumulative grade point average for the academic year for the Maryland Teacher Scholarship recipients attending that institution. The grade point average will be computed using the procedures in use by the institution. The institution's calculation of the grade point average is final. The Office of

Student Financial Assistance does not round any reported grade point averages. If the reported calculation is below a 3.0, the recipient's Maryland Teacher Scholarship will not be renewed. The Office of Student Financial Assistance also may ask the school to verify the recipient's grade point average by submitting an official transcript.

~~If the institution cannot compute a grade point average for the academic year, it must submit a grade point average for each semester the student was enrolled during the academic year. If either semester average is below a 3.0, the college must report the number of hours attempted and the number of hours completed for the semesters in which the student is enrolled.~~

A recipient whose award has been canceled may request reinstatement of the scholarship if the academic performance in summer school immediately following the academic year for which the scholarship was received raises the grade point average to 3.0 or above.

A recipient whose award has been canceled may request reinstatement of the scholarship after the student's grade point average for the subsequent academic year is once again 3.0 or higher. If the student fails for a second time to maintain a grade point average of 3.0, the award is canceled and may not be reinstated.

H. REVOCATION OF AWARD

The Maryland Teacher Scholarship is canceled if the student:

1. ceases to be a Maryland resident;
2. fails to enroll at a Maryland higher education institution in an eligible program;
3. fails to enroll as a full-time student taking at least 12 credit hours each semester in an undergraduate program, or 9 credit hours each semester in a graduate program, or its equivalent; or
4. fails to enroll as a part-time undergraduate or graduate student taking at least 6 credit hours each semester;
5. does not earn a minimum 3.0 cumulative grade point average;
6. fails to make satisfactory academic progress towards a degree or certificate;
or
7. fails to maintain the standards of the institution.

I. PAYMENT

Each semester, eligible institutions shall certify on billing rosters provided by the Office of Student Financial Assistance that the recipient:

1. is a Maryland resident;
2. is enrolled in an eligible academic program leading to a Maryland professional teacher's certificate;
3. is enrolled for 12 or more hours as a full-time undergraduate, 9 or more hours as a full-time graduate student, or 6 or more hours as a part-time undergraduate or graduate student;
4. is making satisfactory academic progress towards a degree; and
5. maintains the standards of the institution.

J. SERVICE OBLIGATION

Recipients are required to begin employment in the State within one year after completion of certificate or degree program. The recipient is required to perform the service obligation for one year for each year that the recipient received the scholarship. For each partial year, in addition to a complete academic year, that the recipient receives the scholarship, one year of service must be performed. Eligible employment is defined as full-time employment as an elementary or secondary school teacher in a Maryland public school. On the forms provided by the Office of Student Financial Assistance, the employing or contracting agency or approved employer must certify annually that the recipient is performing the service requirement.

The service obligation begins after completion of the degree or certification program, and cannot be fulfilled prior to completion.

A recipient of the Maryland Teacher Scholarship who also receives a ~~Distinguished Scholar-Teacher~~ additional service related awards may not fulfill the required service obligations of ~~the both~~ scholarships concurrently. The recipient must fulfill the service obligation for the Maryland Teacher Scholarship in addition to the service obligation for the ~~Distinguished Scholar-Teacher~~ additional awards, one year for each year or partial year that the recipient received ~~the each~~ award.

K. REPAYMENT

A recipient will be required to repay the State if the recipient:

1. has the award revoked;

2. fails to receive the appropriate degree;
3. fails to complete the annual questionnaire on performance of service obligation;
4. fails to perform the service obligation for the required amount of time; or
5. otherwise fails to carry out the obligations of the scholarship.

Interest on the funds advanced is an interest rate equal to and matching the interest rate established by the United States Department of Education for the Federal Stafford Loan on the first day of July of each year (enacted by the Maryland General Assembly October 1, 2000), with interest not accruing prior to notification to the Commission of a recipient's graduation or termination from an institution of higher education. Repayment of the grant is waived at the rate of one academic year for each calendar year the recipient performs the service obligation. The repayment schedule is established by the Office of Student Financial Assistance, and payment must be completed within 6 years after repayment begins.

L. DEFERMENT OR WAIVER OF THE SERVICE OBLIGATION AND REPAYMENT

1. It is the intention of the Office of Student Financial Assistance (OSFA) that the recipient will seek employment aggressively in all regions of the State in which eligible employment opportunities exist in Maryland public schools.

A recipient may receive a deferment during the time the recipient is:

- a. on a temporary leave of absence approved by the employer or the OSFA from full-time employment in the required employment field;
- b. temporarily totally disabled, for a period not to exceed three years; or
- c. unable to secure employment for a period not to exceed twelve months by reason of the care required by a spouse or child who is disabled;
- d. enrolled in a full-time course of study at an institution of higher education in a degree granting program for a period not to exceed twelve months;

The total number of years a recipient may receive a deferment cannot exceed three.

2. To qualify for any of the deferments a recipient shall notify the Office of Student Financial Assistance, and the Central Collection Unit if the repayment period has begun, of the recipient's claim for the deferment and provide supporting documentation. Such documentation shall consist of:
 - a. certification by the employer that the recipient is on a temporary approved leave of absence from the required employment;
 - b. a sworn affidavit of a qualified physician that the recipient is temporarily totally disabled;
 - c. a sworn affidavit of a qualified physician if the recipient is unable to find employment by reason of the care required by spouse or child who is disabled;
 - d. a certified statement including a list of possible eligible employers with their addresses and telephone numbers to which application has been made if the recipient has been unable to find full-time employment in the required field;-
 - e. certification by the college's office of the registrar if the recipient has returned to a full-time course of study at an eligible institution of higher education.

The Office of Student Financial Assistance shall review all documentation to determine whether the deferment conditions have been met and, if so, for what time periods. Before a deferment based on inability to find employment in the eligible field is granted, the Office of Student Financial Assistance will review the submitted documentation and any other information available to it for evidence that the recipient has sought employment aggressively in all regions of the State in which eligible employment opportunities exist in the eligible fields.

During the time a recipient qualifies for any of the deferments described in item 1, the recipient need not make the scholarship repayments and the interest does not accrue.

3. The Office of Student Financial Assistance shall waive a recipient's grant repayment obligation if it determines:
 - a. on the basis of a sworn affidavit of a qualified physician, that the recipient is unable to perform the service obligation on a full-time basis because of an impairment that is expected to continue indefinitely or result in death; or

- b. on the basis of a death certificate or other evidence of death that is conclusive under State law, that the recipient has died;
- 4. The Office of Student Financial Assistance shall forgive a recipient of a Maryland Teacher Scholarship for up to 2 years of an award if:
 - a. the recipient has taken the teacher certification examination, approved by the State Board of Education, in 2 consecutive years; and
 - b. the recipient fails to pass the teacher certification examination within the time period specified by the Office of Student Financial Assistance.

M. APPEALS

1. Categories of Appeals

Maryland Teacher Scholarship recipients can appeal their eligibility for an award for the following criteria:

- a. be enrolled as a full-time student and take at least 12 semester hours of courses each semester or its equivalent: Students enrolled for less than 12 credits can still be considered eligible for a full-time ~~for the~~ Maryland Teacher Scholarship award if they are participating in a specific course or activity (such as an internship or a practicum) that is required by the institution to complete their academic program. To be considered full-time the actual time spent in the classroom, lab, supervised activity or clinic must equal 180 clock hours or more in a regular semester. The student must be enrolled for a minimum of 6 credit hours.
- b. maintenance of a 3.0 cumulative grade point average: If a student should fail to meet this requirement, satisfactory evidence as specified below must be presented to the OSFA of extenuating circumstances that prevented the student from achieving the required GPA.

2. Appeal Procedures

The student must complete an appeal form provided by the Office of Student Financial Assistance. In completing the appeal form, the student must document the conditions upon which the appeal is based as specified below. Upon receipt of the appeal, the documentation will be reviewed

and a decision will be rendered. The student will be notified of the outcome of the appeal in writing.

- a. full-time equivalency: If a student is enrolled in a specific course or activity (such as an internship or a practicum) that is required by the institution to complete their academic program that results in the student being enrolled for less than 12 credit hours, the student may appeal for consideration for an award. In addition to the appeal form, the student must submit documentation, which includes a statement from the student's department chair that describes the program requirements for that semester and a catalog description of the program and classes involved. The documentation shall also list the number of clock hours required for each activity.
- b. grade point average: The following circumstances are considered acceptable as grounds for an appeal:
 - (1) serious illness or injury of the student;
 - (2) serious illness of a member of the student's immediate family;
 - (3) serious personal emotional difficulties of the student;
 - (4) death of the student or a member of the student's immediate family; or
 - (5) other serious personal circumstances.

N. FUNDING

The funding for the Maryland Teacher Scholarship shall be as provided in the annual budget of the Commission and all awards are contingent upon the continued availability of such funding.

MARYLAND HIGHER EDUCATION COMMISSION
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES
FOR THE
MARYLAND HOPE SCHOLARSHIP

APPROVED: JUNE 2002
REVISED & SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION

Office of Student Financial Assistance

Guidelines for the Maryland HOPE Scholarship

AUTHORITY

The Maryland HOPE Scholarship program was enacted into law by the Maryland General Assembly (Annotated Code of Maryland - Education Article Section 18-2301) in 1999. Under law (Annotated Code of Maryland - Education Article Section 18-204), the Maryland Higher Education Commission has the authority to establish regulations for the administration of this program.

A. PURPOSE

The purpose of the Maryland HOPE Scholarship is to assist in meeting the State's need for well trained and highly skilled workers in program or career shortage areas. Students who perform well academically in high school and agree to work full-time in Maryland qualify for scholarship assistance.

B. ELIGIBILITY

To be eligible for assistance under the Maryland HOPE Scholarship program, an applicant must meet the following general requirements:

1. be a Maryland resident;
2. be a U.S. citizen or eligible noncitizen;
3. be in the senior year of high school at the time of application;
4.
 - a. have an un-weighted cumulative grade point average of at least 3.0 on a 4.0 scale or its equivalent in core curriculum courses after the completion of the first semester of the senior year;
 - b. beginning in academic year **2003-2004** have an overall grade point average of at least 3.0 on a 4.0 scale or its equivalent after the completion of the first semester of the senior year.
5. intend to enroll as a full-time student in an eligible academic program;
6. graduate from a secondary school ~~in Maryland~~;

7. be accepted for admission in a regular undergraduate program at a Maryland higher education institution;
8. begin college within 2 years of completing high school;
9. have an annual total family income of \$95,000 or below;
10. submit a completed Maryland HOPE Scholarship application to the State Office of Student Financial Assistance by March 1;
11. file the Free Application for Federal Student Aid by March 1; and
12. agree to perform the required service or repay the State if the service obligation is not performed.

C. APPLICATION PROCESS

Students must apply for a HOPE Scholarship by completing the application form provided by the Office of Student Financial Assistance, and filing by March 1. Applications completed by students will be submitted to the Office of Student Financial Assistance by the designated high school official. The high school will provide for each applicant an official high school transcript reflecting high school grades through the first semester of the senior year and a grade point average calculated according to directions provided by the Office of Student Financial Assistance. Applications must be received by the Office of Student Financial Assistance by March 1.

D. ELIGIBLE ACADEMIC PROGRAMS

The Maryland Higher Education Commission shall annually, by July 1, establish a list of academic programs eligible for the Maryland HOPE Scholarship Program. This priority list shall be created in consultation with the appropriate advisory boards of the Commission, the Department of Business and Economic Development, and representatives of higher education and private industry.

In any year in which an area is determined by the Commission to no longer be an area of critical shortage, no additional new awards will be made in that area. Awards will be renewed for qualified students who received an initial award prior to this determination.

E. VERIFICATION

1. OSFA is required annually to verify application information for a percentage of all new Hope General Award recipients to determine if students are submitting accurate financial data for determining their awards.
2. OSFA will select students flagged for federal verification and submit those selected to the institution to which they are attending. The percent of flagged students selected will be 50%:
3. Once students are selected, schools are required to verify the following using federal standards:
 - a. Taxable and non-taxable income of student and parents (if a dependent student)
 - b. Enrollment status (undergraduate or graduate)
 - c. Dependency status
 - d. Transaction number of ISIR used
3. Schools must provide updated and verified data to OSFA by the date established each year.
4. Information verified by the institutions will be used to update OSFA records. Awards for students with corrections and errors will be recalculated and adjusted as specified in E. Award Calculation, section 3 or cancelled accordingly.

FE. AWARD AMOUNT

The award amount will be \$3,000 annually for students enrolled at 4-year higher education institutions and \$1,000 annually for students enrolled at 2-year higher education institutions. The scholarship ~~may~~ only be used for tuition and mandatory fees.

A student transferring from a 2-year eligible institution to a 4-year eligible institution may receive an annual award of \$3,000, once the student is enrolled at the 4-year eligible institution.

GF. SELECTION OF RECIPIENTS

Eligible applicants will be placed in rank order on the basis of cumulative grade point average. The grade point average is calculated on a 4.0 scale. Courses are not weighted based on degree of difficulty and values for plus or minus grades are not used.

If letter grades are not reported by a school, a letter grade will be assigned to each numeric interval the school uses and a grade point average on a 4.0 scale will be computed. Recipients will be selected based on a statewide ranking of the student's cumulative grade point average, beginning with the highest grade point average, up to the total amount that has been appropriated for the program.

HG. AWARD NOTIFICATION

Recipients will be notified in writing of the scholarship award. In order to accept an award, the recipient must provide written acceptance of the award and must sign a promissory note and submit both to the Office of Student Financial Assistance by the date specified in the award notice.

IH. RENEWAL AND CONTINUATION

A HOPE Scholarship may be renewed if the recipient:

1. remains a resident of the State of Maryland;
2. remains enrolled in an eligible institution;
3. remains enrolled in an eligible academic program;
4. remains enrolled as a full-time student for each semester;
5. maintains a minimum 3.0 cumulative grade point average;
6. makes satisfactory academic progress towards a degree according to the institutions standards; and
7. maintains the standards of the institution.

If meeting the above eligibility requirements, an award for a student enrolled in an associate degree program may be renewed on an annual basis for 1 year and an award for a student enrolled in a baccalaureate degree program may be renewed on an annual basis for 3 years. If a student is enrolled in a baccalaureate degree program that, as determined by the institution, requires 5 years to complete, an award may be renewed for 4 years if the recipient meets all other eligibility requirements.

A student transferring from one institution to another can continue to receive the award as long as they meet all of the eligibility requirements.

A student transferring from a 2-year eligible institution to a 4-year eligible institution may hold the award for a total of 5 years, including the years at both the 2-year

and 4-year higher education institution, as long as all of the eligibility requirements are met.

Following the spring semester, the Office of Student Financial Assistance will request the postsecondary institution to provide a certified cumulative grade point average for the academic year for the HOPE Scholarship recipients attending that institution. The grade point average will be computed using the procedures in use by the institution. The institution's calculation of the grade average is final. The Office of Student Financial Assistance does not round any reported grade point averages. If the reported calculation is below a 3.0, the recipient's HOPE Scholarship will not be renewed. The Office of Student Financial Assistance also may ask the school to verify the recipient's grade point average by submitting an official transcript.

~~If the institution cannot compute a grade point average for the academic year, it must submit a grade point average for each semester the student was enrolled during the academic year. If either semester average is below a 3.0, the college must report the number of hours attempted and the number of hours completed for the semesters in which the student is enrolled, along with the most recent cumulative grade point average achieved.~~

A recipient whose award has been canceled may request reinstatement of the scholarship if the academic performance in summer school immediately following the academic year for which the scholarship was received raises the cumulative grade point average to 3.0 or above.

A recipient whose award has been canceled may request reinstatement of the scholarship after the student's cumulative grade point average for the subsequent academic year is once again 3.0 or higher. If the student fails for a second time to maintain a grade point average of 3.0, the award is canceled and may not be reinstated.

J. REVOCATION OF AWARD

The Maryland HOPE Scholarship is canceled if the student:

1. ceases to be a Maryland resident;
2. fails to enroll at a Maryland higher education institution in an eligible program;
3. fails to enroll as a full-time student and takes less than 12 credit hours each semester or its equivalent;
4. does not earn a 3.0 ~~annual~~ cumulative grade point average;
5. fails to make satisfactory academic progress towards a degree; or

6. fails to maintain the standards of the institution.

KJ. PAYMENT

Each semester, eligible institutions shall certify on billing rosters provided by the Office of Student Financial Assistance that the recipient:

1. is a Maryland resident;
2. is enrolled in an eligible academic program;
3. is enrolled for 12 or more hours as an undergraduate student; and
4. is making satisfactory academic progress towards a degree; and
5. maintains the standards of the institution.

LK. SERVICE OBLIGATION

Recipients are required to begin employment in the State within one year after completion of undergraduate studies. The recipient is required to perform the service obligation for one year for each year, or portion thereof, that the recipient received a scholarship. On the forms provided by the Office of Student Financial Assistance, the employing or contracting agency or approved employer must certify annually that the recipient is performing the service requirement in the manner prescribed.

The service obligation begins after graduation and cannot be fulfilled prior to graduation.

ML. REPAYMENT

A recipient will be required to repay the State if the recipient:

1. has the award revoked;
2. fails to receive the appropriate degree;
3. fails to complete the annual questionnaire on performance of service obligation;
4. fails to perform the service obligation for the required amount of time; or
5. otherwise fails to carry out the obligations of the scholarship.

Interest on the funds advanced is an interest rate equal to and matching the interest rate established by the United States Department of Education for the Federal Stafford Loan on the first day of July of each year (enacted by the Maryland General Assembly October 1, 2000), with interest not accruing prior to notification to the Commission of a recipient's graduation or termination from an institution of higher education. Repayment of the grant is waived at the rate of one academic year for each calendar year the recipient performs the service obligation. The repayment schedule is established by the Office of Student Financial Assistance, and payment must be completed within 6 years after repayment begins.

NM. DEFERMENT OR WAIVER OF THE SERVICE OBLIGATION AND REPAYMENT

1. It is the intention of the Office of Student Financial Assistance (OFSA) that the recipient will seek employment aggressively in all regions of the State in which eligible employment opportunities exist in the eligible fields.

A recipient may receive a deferment during the time the recipient is:

- a. on a temporary leave of absence approved by the employer or the OFSA from full-time employment in the required employment field;
- b. temporarily totally disabled, for a period not to exceed three years;
- c. unable to secure employment for a period not to exceed twelve months by reason of the care required by a spouse or child who is disabled; or
- d. seeking and unable to find the required employment for a single period not to exceed 12 months.
- e. enrolled in a full-time course of study at an institution of higher education in a degree granting program for a period not to exceed twelve months.

The total number of years a recipient may receive a deferment cannot exceed two.

2. To qualify for any of the deferments a recipient shall notify the Office of Student Financial Assistance, and the Central Collection Unit if the repayment period has begun, of the recipient's claim for the deferment and provide supporting documentation. Such documentation shall consist of:

- a. certification by the college's office of the registrar if the recipient has returned to a full-time course of study at an eligible institution of higher education;
- b. certification by the employer that the recipient is on a temporary approved leave of absence from the required employment;
- c. a sworn affidavit of a qualified physician that the recipient is temporarily totally disabled;
- d. a sworn affidavit of a qualified physician if the recipient is unable to find employment by reason of the care required by spouse or child who is disabled;
- e. a certified statement including a list of possible eligible employers with their addresses and telephone numbers to which application has been made if the recipient has been unable to find full-time employment in the required field.

The Office of Student Financial Assistance shall review all documentation to determine whether the deferment conditions have been met and, if so, for what time periods.

Before a deferment based on inability to find employment in the eligible field is granted, the Office of Student Financial Assistance will review the submitted documentation and any other information available to it for evidence that the recipient has sought employment aggressively in all regions of the State in which eligible employment opportunities exist in the eligible fields.

During the time a recipient qualifies for any of the deferments described in item 1, the recipient need not make the scholarship repayments and the interest does not accrue.

- 3. The Office of Student Financial Assistance shall waive a recipient's grant repayment obligations if it determines:
 - a. on the basis of a sworn affidavit of a qualified physician, that the recipient is unable to perform the service obligation on a full-time basis because of an impairment that is expected to continue indefinitely or result in death; or
 - b. on the basis of a death certificate or other evidence of death that is conclusive under State law, that the recipient has died.

ON. APPEALS

1. Categories of Appeals

Maryland HOPE Scholarship recipients can appeal their eligibility for an award for the following criteria:

- a. be enrolled as a full-time student and take at least 12 semester hours of courses each semester or its equivalent: Students enrolled for less than 12 credits can still be considered eligible for the HOPE Scholarship if they are participating in a specific course or activity (such as an internship or a practicum) that is required by the institution to complete their academic program. To be considered full-time, the actual time spent in the classroom, lab, supervised activity or clinic must equal 180 clock hours or more in a regular semester. The student must be enrolled for a minimum of 6 credit hours.
- b. maintenance of a 3.0 cumulative grade point average: If a student should fail to meet this requirement, satisfactory evidence as specified below must be presented to OSFA of extenuating circumstances that prevented the student from achieving the required GPA.

2. Appeal Procedures

The student must complete an appeal form provided by the Office of Student Financial Assistance. In completing the appeal form, the student must document the conditions upon which the appeal is based as specified below. Upon receipt of the appeal, the documentation will be reviewed and a decision will be rendered. The student will be notified of the outcome of the appeal in writing.

- a. full-time equivalency: If a student is enrolled in a specific course or activity (such as an internship or a practicum) that is required by the institution to complete their academic program that results in the student being enrolled for less than 12 credit hours, the student may appeal for consideration for an award. In addition to the appeal form, the student must submit documentation which includes a statement from the student's department chair that describes the program requirements for that semester and a catalog description of the program and classes involved. The documentation shall also list the number of clock hours required for each activity.

- b. grade point average: The following circumstances are considered acceptable as grounds for an appeal:
- (1) serious illness or injury of the student;
 - (2) serious illness of a member of the student's immediate family;
 - (3) serious personal emotional difficulties of the student;
 - (4) death of a member of the student's immediate family; or
 - (5) other serious personal circumstances.

PØ. FUNDING

The funding for the Maryland HOPE Scholarship shall be as provided in the annual budget of the Commission and all awards are contingent upon the continued availability of such funding.

MARYLAND HIGHER EDUCATION COMMISSION

OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR THE

HOPE FOR NONTRADITIONAL STUDENTS - COMMUNITY COLLEGE
TRANSFER SCHOLARSHIP PROGRAM

APPROVED: SEPTEMBER 28, 2000
REVISED AND SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION
Office of Student Financial Assistance

Guidelines for the
HOPE for Nontraditional Students-Community College Transfer Scholarship Program

AUTHORITY:

The HOPE for Nontraditional Students-Community College Transfer Scholarship Program was enacted into law by the Maryland General Assembly (Annotated Code of Maryland-Article Section 18-112; and 18-2401 through 18-2407) in 2000. Under law (Annotated Code of Maryland-Education Article Section 18-112), the Maryland Higher Education Commission has the authority to establish regulations for the administration of this program.

A. PURPOSE

The purpose of the HOPE for Nontraditional Students-Community College Transfer Scholarship is to assist and encourage transfer students to attend a 4-year institution within the State.

B. ELIGIBILITY

To be eligible for assistance under the HOPE for Nontraditional Students-Community College Transfer Scholarship Program, an applicant must meet the following general requirements:

1. be a Maryland resident;
2. be a U.S. citizen or eligible non-citizen;
3. be currently enrolled at a community college in Maryland;
4. maintain a minimum cumulative 3.0 grade point average on a 4.0 scale while a student at a community college in Maryland;
5. have completed at least 60 credits at a community college in Maryland, or have earned an associate's degree by the end of the semester in which the applicant plans to transfer;
6. enroll as a full-time, degree seeking student at a Maryland 4-year institution;

7. file the Free Application for Federal Student Aid by March 1; and
8. have an annual total family income of not more than ~~\$80,000~~\$95,000.

C. APPLICATION PROCESS

Students must apply for a HOPE for Nontraditional Students-Community College Transfer Scholarship by completing the HOPE application form provided by the Office of Student Financial Assistance and returning it by March 1 for priority consideration. The student must also file the Free Application for Federal Student Aid by March 1 to the federal processor. The student will provide an official college transcript reflecting grades during the last 60 credit hours earned while attending a community college. Applications will be considered after March 1 as long as funds remain available.

D. AWARD AMOUNT

The award amount will be \$3,000 for students enrolled at 4-year higher education institutions. The scholarship may be used for tuition and mandatory fees.

E. SELECTION OF RECIPIENTS

Eligible applicants will be ranked on the basis of cumulative grade point average. Awards will be made to students beginning with the highest grade point average. Students will be awarded until the total amount of funds appropriated for the program have been depleted. Grades for credits earned within the last 5 years will be used to calculate the cumulative grade point average.

F. AWARD NOTIFICATION

Recipients will be notified in writing of the scholarship award. In order to accept an award, the recipient must provide written acceptance of the award and must sign a guaranteed promissory note and submit both to the Office of Student Financial Assistance by the date specified in the award notice.

G. VERIFICATION

1. OSFA is required annually to verify application information for a percentage of all new HOPE for Nontraditional Students-Community College Transfer Scholarship recipients to determine if students are submitting accurate financial data for determining their awards.
2. OSFA will select students flagged for federal verification and submit those selected to the institution to which they are attending. The percent of flagged students selected will be 50%:

3. Once students are selected, schools are required to verify the following using federal standards:
 - a. Taxable and non-taxable income of student and parents (if a dependent student)
 - b. Enrollment status (undergraduate or graduate)
 - c. Dependency status
 - d. Transaction number of ISIR used
4. Schools must provide updated and verified data to OSFA by the date established each year.
5. Information verified by the institutions will be used to update OSFA records. Awards for students with corrections and errors will be recalculated and adjusted as specified in E. Award Calculation, section 3 or cancelled accordingly.

HG. RENEWAL AND CONTINUATION

A HOPE for Nontraditional Students-Community College Transfer Scholarship may be renewed for a total of 2 years if the recipient:

1. remains a resident of the State of Maryland;
2. continues to be enrolled as an undergraduate student in a degree program at a Maryland 4-year private or public institution of higher education;
- _____ 3. maintains an annual 3.0 grade point average on a 4.0 scale each academic year the recipient is enrolled at a Maryland 4-year private or public institution of higher education in the state or provides evidence satisfactory to the administration of extenuating circumstances; (see Section N); and,
4. maintains the standards of the eligible institution that the recipient attends.

_____ Following the spring semester, the Office of Student Financial Assistance will request the postsecondary institution to provide a certified annual grade point average for the academic year for the Community College Transfer recipients attending that institution. The grade point average will be computed using the procedures in use by the institution.

The institution's calculation of the grade average is final. The OSFA does not round any reported grade point averages. If the reported calculation is below a 3.0, the recipient's Community College Transfer Scholarship will not be renewed. The OSFA also may ask the school to verify the recipient's grade point average by submitting an official transcript.

If the institution cannot compute an annual grade point average for the academic year, it must submit a grade point average for each semester the student was enrolled during the academic year. If either semester average is below a 3.0, the college must report the number of hours attempted and the number of hours completed for the semesters in which the student is enrolled.

A recipient whose award has been canceled may request reinstatement of the scholarship if the academic performance in summer school immediately following the academic year for which the scholarship was received raises the grade point average to 3.0 or above.

IH. REVOCATION OF AWARD

The HOPE for Nontraditional Students-Community College Transfer Scholarship will be canceled if the student:

1. fails to maintain the academic standards of the institution;
2. fails to maintain Maryland residency;
3. fails to maintain an cumulative-annual 3.0 grade point; or
4. fails to enroll as a full-time degree seeking student taking at least 12 credit hours each semester.

IJ. PAYMENT

Each semester, eligible institutions shall certify on billing rosters provided by the Office of Student Financial Assistance that the recipient:

1. is a Maryland resident; and
2. is enrolled for 12 or more hours as a degree seeking undergraduate student; and
3. is making satisfactory academic progress towards a degree.

KJ. SERVICE OBLIGATION

Recipients are required to begin employment in the State within one year after completion of undergraduate studies. A recipient who is presently employed out-of-state when accepting the scholarship will be allowed to fulfill the service obligation out-of-state with his or her present employer. If the recipient changes employers while attending college the recipient will be required to fulfill the service obligation within the State of Maryland.

The recipient is required to perform the service obligation one year for each year that the recipient received a scholarship. On the forms provided by the Office of Student Financial Assistance, the employing or contracting agency or approved employer must certify annually that the recipient is performing the service requirement.

The service obligation begins after graduation and cannot be fulfilled prior to graduation.

A recipient of the Community College Transfer Scholarship who also receives additional service related awards may not fulfill the required service obligations of the scholarships concurrently. The recipient must fulfill the service obligation for the Community College Transfer Scholarship in addition to the service obligation for the additional awards, one year for each year or partial year that the recipient received each award

LK. REPAYMENT

A recipient will be required to repay the State if the recipient:

1. has the award revoked;
2. fails to complete a bachelor's degree;
3. fails to complete the annual questionnaire on performance of service obligation;
4. fails to perform the service obligation for the required amount of time; or
5. otherwise fails to carry out the obligations of the scholarship.

Interest on the funds advanced will be calculated as the interest rate equal to the federal Stafford Loan Program established July 1 each year with interest not accruing prior to a recipient's graduation or termination from an institution of higher education. The repayment schedule is established by the Office of Student Financial Assistance, and payment must be completed within 6 years after repayment begins.

ML. DEFERMENT OR WAIVER OF THE SERVICE OBLIGATION AND REPAYMENT

1. It is the intention of the Office of Student Financial Assistance (OSFA) that the recipient will seek employment aggressively in all regions of the State in which employment opportunities exist.

A recipient may receive a deferment during the time the recipient is:

- a. enrolled in a full-time undergraduate course of study at an institution of higher education in a degree-granting program for a period not to exceed twelve months;
- b. on a temporary, employee or OSFA approved leave of absence from full-time employment in the required employment field for a period not to exceed twelve months;
- c. temporarily totally disabled, for a period not to exceed three years;
- d. unable to secure employment for a period not to exceed twelve months by reason of the care required by a spouse or child who is disabled; or
- e. seeking and unable to find the required employment for a single period not to exceed 12 months.

To qualify for any of the deferments a recipient shall notify the Office of Student Financial Assistance, and the Central Collection Unit if the repayment period has begun, of the recipient's claim for the deferment and provide supporting documentation. Such documentation shall consist of:

- a. certification by the college's office of the registrar if the recipient has returned to a full-time course of study at an eligible institution of higher education;
- b. certification by the employer that the recipient is on a temporary approved leave of absence from the required employment;
- c. a sworn affidavit of a qualified physician that the recipient is temporarily totally disabled;
- d. a sworn affidavit of a qualified physician if the recipient is unable to find employment by reason of the care required by spouse or child who is disabled;
- e. a certified statement including a list of possible eligible employers with their addresses and telephone numbers to which application has been made

if the recipient has been unable to find full-time employment in the required field.

The Office of Student Financial Assistance shall review all documentation to determine whether the deferment conditions have been met and, if so, for what time periods. Before a deferment based on inability to find full-time employment in the State is granted, the Office of Student Financial Assistance will review the submitted documentation and any other information available to it for evidence that the recipient has sought employment aggressively in all regions of the State in which employment opportunities exist.

During the time a recipient qualifies for any of the deferments described, the recipient need not make the scholarship repayments and the interest does not accrue.

2. The Office of Student Financial Assistance shall waive a recipient's grant repayment obligations if it determines:

a. on the basis of a sworn affidavit of a qualified physician, that the recipient is unable to perform the service obligation on a full-time basis because of an impairment that is expected to continue indefinitely or result in death; or

b. on the basis of a death certificate or other evidence of death that is conclusive under State law, that the recipient has died.

NM. APPEALS

1. Categories of Appeals

Hope Community College Transfer Scholarship recipients can appeal their eligibility for an award on the basis of the following criteria:

- a. Enrollment as a full-time degree-seeking student (at least 12 semester hours of courses each semester or its equivalent): to be considered full-time, the actual time spent in the classroom, lab, supervised activity or clinic must equal 180 clock hours or more in a regular semester. Students enrolled for less than 12 credits can still be considered eligible for the Community College Transfer Scholarship if they are participating in a specific course or activity (such as an internship or a practicum) that is required by the institution to complete their academic program. The student must be enrolled for a minimum of 6 credit hours.
- b. Maintenance of a 3.0 annual grade point average: If a student should fail to meet this requirement, satisfactory evidence as specified below

must be presented to OSFA of extenuating circumstances that prevented the student from achieving the required GPA.

2. Appeal Procedures

The student must complete an appeal form provided by the Office of Student Financial Assistance. In completing the appeal form, the student must document the conditions upon which the appeal is based as specified below. Upon receipt of the appeal, the documentation will be reviewed and a decision will be rendered. The student will be notified of the outcome of the appeal in writing.

- a. Full-time equivalency: If a student is enrolled in a specific course or activity (such as an internship or a practicum) that is required by the institution to complete the academic program, resulting in the student's being enrolled for less than 12 credit hours, the student may appeal for consideration for an award. In addition to the appeal form, the student must submit documentation which includes a statement from the student's department chair that describes the program requirements for that semester and a catalog description of the program and classes involved. The documentation shall also list the number of clock hours required for each activity.
- b. grade point average: The following circumstances are considered acceptable as grounds for an appeal:
 - (1) serious illness or injury of the student;
 - (2) serious illness of a member of the student's immediate family;
 - (3) serious personal emotional difficulties of the student;
 - (4) death of a member of the student's immediate family; or
 - (5) other serious personal circumstances.

ON. FUNDING

The funding for the HOPE Nontraditional Students - Community College Transfer Scholarship shall be as provided in the annual budget of the Commission and all awards are contingent upon the continued availability of such funding.

MARYLAND HIGHER EDUCATION COMMISSION
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES
FOR THE
DISTINGUISHED SCHOLAR PROGRAM

APPROVED: MAY 17, 1995
REVISED AND SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION
Office of Student Financial Assistance

Guidelines for the Distinguished Scholar Program

AUTHORITY

The Distinguished Scholar Program was enacted by the 1978 Maryland General Assembly (Education Article - Annotated Code, Sections 18-1101 *et. seq.*). The Office of Student Financial Assistance has the authority to adopt rules and regulations to administer this program (Education Article - Annotated Code Section 18-204).

A. PURPOSE

The purpose of this program is to identify Maryland high school students who are highly able academically or artistically in order to provide a scholarship incentive for them to enroll in Maryland colleges or universities or other accredited Maryland postsecondary schools as full-time undergraduate students.

B. ELIGIBILITY

A recipient of assistance must be:

1. qualified academically as defined in Section E of these Guidelines;
2. a resident of Maryland;
3. enrolled in an eligible accredited postsecondary institution;
4. enrolled full-time; and
5. enrolled as an undergraduate student pursuing a first undergraduate degree.

C. AWARD AMOUNT

The amount of the scholarship is \$3,000 per academic year. The scholarship may be applied to tuition, mandatory fees, room, board, books, and supplies. The award is in addition to any other State scholarships that may be offered to the student.

If the award is a portion of a student's campus aid package, it is expected that the institutional aid officer will coordinate the award with the other awards to insure that all State and Federal law and program requirements are met.

D. APPLICATION

A student may apply in three categories.

1. Superior Academic Achievement

High school juniors who believe they meet the basic selection criteria as described in Section E may complete an application form provided by the Office of Student Financial Assistance. Forms will be mailed to Maryland high schools or may be requested directly from the Office of Student Financial Assistance. Forms completed by students will be submitted to the Office of Student Financial Assistance by the designated high school official. The high school will provide for each applicant a high school transcript; results of the PSAT, SAT, or ACT, if available; a grade point average calculated according to directions provided by the Office of Student Financial Assistance; a certification of eligibility; and other forms or information if requested.

Those who may not meet the basic selection may apply at this time by following the appeal procedure as described in Section L.2.

2. Superior Artistic Talent

High school juniors nominated by designated school officials may complete an application provided by the Office of Student Financial Assistance. Each high school in Maryland may nominate five students. A school designated as a magnet School for the Arts which enroll only students in the Arts from Baltimore City or a County, may nominate ten students. The categories in which students may be nominated are dance, drama, instrumental music, vocal music, and visual arts.

3. National Merit Finalists and National Achievement Finalists

Maryland high schools will be asked annually to identify National Merit and National Achievement semifinalists as selected by the National Merit Scholarship Corporation and to provide the Office of Student Financial Assistance with complete home mailing addresses of the semifinalists. All semifinalists will be mailed an application to apply for a Distinguished Scholarship.

E. QUALIFICATIONS AND SELECTION OF RECIPIENTS

Academic or artistic merit are the criteria used for selection in this program; financial need is not a selection criterion in any aspect of the program. There are three ways by which students are selected.

1. Superior Academic Achievement

Students applying in the Superior Achievement category who meet the threshold requirement of a 3.7 high school total cumulative grade point average as defined below will be placed in rank order on each of two ranking scales. One scale shall rank applicants on the basis of SAT scores, and the other on the basis of total cumulative grade point average. Finalists and semi-finalists will be selected in rank order from each of the two ranking scales by assigning students the lower of the two ranks the student achieved on the two ranking lists.

The GPA scale will use a GPA developed using the following criteria. Only academic subjects taken during the first 2 1/2 years (five semesters) of a student's secondary school experience will be included. Academic courses are limited to mathematics (algebra I and beyond) foreign languages, social studies, natural or physical science, English, computer science requiring knowledge of algebra I or higher and other academic courses in a college preparatory program.

The grade point average is calculated on a 4.0 scale. Courses are not weighted based on degree of difficulty and values for plus or minus grades are not used. The following values are assigned to each year-end grade to calculate grade point average:

A =	4
B =	3
C =	2
D =	1
F =	0

If letter grades are not reported by the school, a letter grade will be assigned to each numeric interval the school uses and a grade point average on a 4.0 scale will be computed.

The highest set of PSAT, SAT, or ACT scores is used to determine SAT rank. The highest set of PSAT or SAT scores are added (Verbal + Math); students are ranked on the basis of this total. If an SAT score is not available, the ACT score is converted to an SAT equivalent using the conversion scale currently in use by the Office of Student Financial Assistance. Test results from the junior testing in January or earlier are used.

In the event of a tie on the GPA rank, the SAT score will be used to rank all students at the GPA interval or point where the tie occurs. In the event of a tie in the SAT rank, the GPA will be used to break the tie.

A minimum of two recipients will be selected from Baltimore City and each county. In a county or Baltimore City, if only one student qualifies or no one qualifies on the basis of the statewide selections lists, the top one or two students in each county or Baltimore City list will be selected as recipients.

Those students designated as semifinalists and honorable mentions are alternates to receive a scholarship if it is not used by a finalist.

2. Superior Artistic Talent

Applicants in the talent category must appear in person to be auditioned or have their portfolios reviewed during a competition period established by the Office of Student Financial Assistance. Applicants will be judged by professional musicians, artists, or performers, or professional educators who will use criteria established by the Office of Student Financial Assistance.

Each judge in each talent area will rate each applicant on the established criteria. The judges will pool their results and will select a number of finalists in each talent area. The number of finalists specified in a talent area will be based upon the ratio of applicants in the talent area compared to the total number of applicants in the overall talent competition. Judges also will select at least an equal number of semifinalists and will place the semifinalists in rank order. The decision of the judges is final.

Talent applicants will be given audition/portfolio guidelines. The guidelines will include performance or portfolio presentation requirements and a statement of the judging criteria. The judging criteria are:

- **Dance:** Technical control, flexibility, coordination, musicality, stylistic integrity, performance energy, and potential for further creative development.
- **Drama:** Movement, projection, vocal and physical articulation, stage presence, oral interpretation, realism/naturalism, emotional involvement, conviction, creativity and potential for further creative development.
- **Instrumental Music:** Musicianship, projection, technical proficiency, articulation, intonation, creative interpretation, rhythmic accuracy, ~~vocal quality~~timbre, dynamic range, and potential for further creative development.

- **Vocal Music:** tone quality, technical proficiency, musicality/phrasing, breath support, intonation, diction (language), accuracy (rhythm/pitch), projection, and potential for further creative development.
 - **Visual Art:** Creativity, degree of excellence, technical proficiency, design sense, color sense, and potential for further creative development.
3. National Merit Scholarship Finalists and National Achievement Scholarship Finalists

The selection of National Merit Scholarship Finalists and National Achievement Scholarship Finalists is made by the National Merit Scholarship Corporation of Evanston, Illinois. The process and criteria for selection of finalists are determined by the National Merit Scholarship Corporation. The decisions of the National Merit Scholarship Corporation are final. Students who are selected as finalists by the National Merit Scholarship Corporation are finalists in the Maryland Distinguished Scholar Program.

No other national talent or merit program winners may become eligible for consideration in the Maryland Distinguished Scholar Program through their winning status.

F. AWARDING PROCEDURES

A questionnaire will be mailed to Distinguished Scholar participants to determine their eligibility to receive an award payment. These students are:

1. all students identified as finalists and semifinalists in the achievement category;
2. all students identified as finalists and semifinalists in the talent competition; and
3. all Maryland residents selected as finalists by the National Merit Scholarship Corporation in the National Achievement or National Merit Scholarship Program.

The questionnaire will be mailed to coincide with college selection announcements and the candidates' reply date. On this questionnaire, participants will be asked to provide, at a minimum, identifying information and a declaration of their final postsecondary school choice. National Merit or National Achievement semifinalists must document their status as National Merit or National Achievement finalists by attaching to the form from the Office of Student Financial Assistance a copy of their award certificate or letter from the National Merit Scholarship Corporation.

All Distinguished Scholar achievement and talent finalists who declare an eligible Maryland accredited postsecondary institution as their final choice, will be sent an official notice of an award. After all Distinguished Scholar achievement and talent finalists and National Merit and National Achievement finalists who have been determined to be eligible for an award have been sent award letters, semifinalists in the achievement and talent categories will be offered awards until 350 scholarships have been awarded. These replacement awards will be made starting in June and continue until the number of awards budgeted have been made.

The official scholarship notice sent to the student must be returned to the Scholarship Administration within two weeks of its date in order for the recipient to accept the award.

G. ALLOCATION OF AWARDS AND PRIORITIES

A minimum of two awards will be made to eligible students in each county and the city of Baltimore.

Students may apply and win in all three categories of the program. However, students may receive only one award.

H. RENEWAL AND CONTINUATION

Renewal of the scholarship is automatic provided that the recipient continues to meet eligibility requirements as stated in Section B and maintains a 3.0 grade average for each academic year.

Following the spring semester, the Office of Student Financial Assistance will request the postsecondary institution to provide a certified annual grade point average for the academic year for the Distinguished Scholar recipients attending that institution. The grade point average will be computed using the procedures in use by the institution. The institution's calculation of the grade average is final. The Scholarship Administration does not round any reported grade point averages. If the reported calculation is below a 3.0, the recipient's Distinguished Scholarship will not be renewed. The Scholarship Administration also may ask the school to verify the recipient's grade point average by submitting an official transcript.

If the institution cannot compute a grade point average for the academic year, it must submit a grade point average for each semester the student was enrolled during the academic year. If either semester average is below a 3.0, the college must report the number of hours attempted and the number of hours completed for the semesters in which the student is enrolled. ~~A recipient whose award has been cancelled may request reinstatement of the scholarship after the student's grade point average for the subsequent academic year is once again 3.0 or higher.~~

~~For the purposes of determining the student's annual grade point average, work taken during any summer school session will not be considered in the calculation if the annual grade point average at the end of the spring term is 3.0 or higher. The summer term grade point will be used in the calculation in the year following the summer session.~~

A recipient who is academically ineligible will have their award cancelled. If funds are available, the award may be reinstated upon proof that the student achieved a 3.0 grade point average in the fall and spring semesters in the academic year following the cancellation of the award. Courses taken in summer school may be considered in calculating a student's annual grade point average.

If the student fails for a second time to maintain a grade point average of 3.0, the award is cancelled and may not be reinstated.

If the school fails to provide the required grade information upon request, the student's award will be cancelled.

A student may not receive the scholarship for more than eight semesters.

I. REVOCATION

This scholarship will be revoked or terminated if a recipient:

1. enrolls at an ineligible school;
2. fails to maintain the requirement of an annual 3.0 grade point average each academic year;
3. fails to enroll in any semester as a full-time student;
4. enrolls as a graduate student; or
5. obtains the first baccalaureate degree.

J. PAYMENT

1. Regular Payment

At the beginning of each term, institutions will be asked to certify that the recipient:

- a. is enrolled as a full-time student that semester or term;
- b. is an undergraduate student; and
- c. has not obtained the first bachelor's degree.

Upon receipt of the certification, the Scholarship Administration will pay the appropriate amount of money to the institution to be credited to the student's account.

2. Summer Courses

Payment for full-time summer study (12 credit hours or more) can be made if the student requests it in advance. Because the payment to a student in an academic year cannot exceed \$3,000, if a student uses a portion of the scholarship in the summer, only one additional semester award can be paid.

3. Study Abroad

If a recipient enrolls in a study abroad program and the program is sponsored directly by an in-state school, the payment will be made directly to the institution according to regular procedures described.

If the program is sponsored by an out-of-state school, and the recipient is enrolled in a one semester program, payment can be made to the student's account of the entire year for the term in which the student is enrolled at an in-state institution. This counts as two semesters of eligibility utilized. For programs lasting for one year, payment is not made. The student may request reinstatement for subsequent years and retains 8 semesters of eligibility.

For purposes of this program, the campuses of the University of Maryland University College are considered to be in-state.

4. Coop Work Program

If a recipient enrolls in a coop program, the recipient may not receive a scholarship for the period of the work portion of the coop program. Following the work portion of the coop program, the student's award will be reinstated if the student requests reinstatement in writing. The student remains eligible for eight semesters. The student should notify the Office of Student Financial Assistance in writing in advance of pending coop participation.

5. Planned Early Graduation

Recipients who are scheduled to graduate at the end of seven semesters of college attendance may be paid their entire scholarship for the year on the fall semester payment.

6. Deferred Awards

A recipient may take a leave of absence for one or two semesters or defer initial college enrollment for one or two semesters upon written request to and approval of the Office of Student Financial Assistance.

K. OTHER CIRCUMSTANCES

1. ~~Out-of-state attendance:~~

If funds permit, a finalist who originally attended an out-of-state college then transferred to a Maryland postsecondary institution will be given an award to attend an eligible Maryland postsecondary institution. The request must be made in writing. The student may make the request before the start of the second academic year after the student's graduation from high school, and must document an annual grade point average of 3.0 or higher.

2. ~~Early graduation:~~

A finalist who enrolls in a postsecondary institution as a full-time undergraduate student immediately following the student's junior year of high school is eligible to receive an award for the freshman year of college.

A semifinalist who enrolls in a postsecondary institution as a full-time undergraduate student immediately following the student's junior year of high school may be considered an alternate to the award when their class begins their freshman year of college.

3. ~~Home-schooling:~~

Home-schooled students may be eligible for the Distinguished Scholar program if they meet the eligibility and qualifications described in sections D and E. The entity that supervises the home instruction and establishes the curriculum must hold a Certificate of Approval or be registered to supervise home instruction by the Maryland State Department of Education and the local county board of education and the curriculum must be clearly identified with grades on an official transcript.

For students applying for the achievement category of the Distinguished Scholar program, the achievement applications must be signed by an administrator of the home school supervising entity and include a letter from the local education agency.

For students applying for the talent category of the Distinguished Scholar program, the talent application must be signed by an administrator of the home school supervising entity or an individual affiliated with the local education agency.

L. APPEAL PROCEDURES

1. Renewal Requirement

The requirement of a 3.0 grade point average is set by law. Students who fail to maintain a 3.0 grade point average required for continuation of the award may appeal to have the award renewed. The purpose of the appeal is to determine if, to the satisfaction of the Secretary of Higher Education, extenuating circumstances of extreme personal hardship prevented the recipient from achieving the required grade point average. The following are the circumstances which can be considered as grounds for an appeal:

- a. serious illness or injury of the student,
- b. serious illness of a member of the student's immediate family,
- c. serious personal emotional difficulties of the student,
- d. the death of a member of the student's immediate family, and
- e. other serious personal circumstances.

The recipient must complete an appeal form provided by the Maryland Higher Education Commission. The appeal must be submitted within three weeks of the date of the notice of the cancellation of the award. With the appeal the student must document the conditions upon which the appeal is based. The documentation shall be a statement from an attending physician, psychologist or mental health professional, a death certificate, or, if the above do not apply, a statement from the Dean of Students at the student's institution.

Upon receipt of the appeal, the documentation will be reviewed by the Secretary of Higher Education and a decision will be made. The student will be notified of the results of the appeal.

2. Achievement Selection Process

Students may appeal for consideration under the program in the event their ~~non-weighted~~ GPA is below the 3.7 required due to their involvement in honors, advanced placement, or gifted and talented programs. The purpose of the appeal is to determine if the applicant's calculated grade point average is the equivalent of the 3.7 minimum grade point average required by law, or higher. An appeal must consist of the following:

- a. a written letter from the student explaining the student's participation in honors or gifted and talented programs;

- b. a letter of recommendation from the high school guidance office or higher school principal; and
- c. the student's application for the program unless previously submitted.

Appeals will be accepted from the time of application submission through November 1 of the application year. Appeals should be directed to the Director of the Office of Student Financial Assistance.

Upon receipt of the appeal letter, the applicant's academic record will be reviewed and consideration will be given to the degree the student's record reflects participation in the school's advanced academic curriculum.

If the review shows significant participation in advanced programs, the applicant will be considered to have the equivalent of a 3.7 grade average and the applicant will be given a final standing based upon the regular selection criteria.

Following the appeal review, the applicants who appealed will be notified of the appeal decision.

3. Correcting Errors

If a school error in reporting grades, grade point averages, or test scores has been identified after the selection process has been completed, the correction will be made, the applicant's standing will be recalculated, and the student will be notified of the results. If the recalculation results in an applicant being eligible for an award, and if no budgeted awards are available the student will be placed in a priority position on any waiting list.

MARYLAND HIGHER EDUCATION COMMISSION
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES
FOR THE
MARYLAND PART-TIME STUDENT GRANT PROGRAM

APPROVED: ~~JUNE 12, 2003~~
REVISED AND SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION
Office of Student Financial Assistance

Guidelines for the Maryland Part-Time Student Grant Program

AUTHORITY

This program of student assistance was enacted by the 1991 Maryland General Assembly. This law (MD Code Ann. §18-1401) provides the Maryland Higher Education Commission (the "Commission") with the authority to establish guidelines or regulations necessary for the administration of the program.

A. PURPOSE

The Part-Time Grant Program was established as part of the Scholarship Reform Act of 1991 and is effective July 1, 1992. The new program was developed by the Commission to address the financial needs of part-time students. The program recognizes the dramatic change that has occurred in the college population in the last decade, with more than fifty percent of degree-seeking students currently enrolled on a part-time basis.

According to statute, the program provides funds to Maryland public and independent colleges and universities based on the number of undergraduate part-time students with demonstrated financial need who are enrolled in degree-granting programs at these institutions. (MD Code Ann. §18-1401) These funds will be awarded by each institution to students enrolled for 6 to 11 credit hours who demonstrate a definite financial need according to financial aid guidelines.

B. INSTITUTIONAL ELIGIBILITY

An eligible institution shall be a public or independent college or university in Maryland that possesses a certificate of approval from the Commission to offer two-year or four-year undergraduate degrees.

C. INSTITUTIONAL PARTICIPATION

Since some institutions may not wish to participate in the program, institutions will be required to submit an application to participate to the Commission by June 15 for the upcoming fiscal year. Institutions will be notified of their allocation by May 1 and funds will be distributed to each institution after July 1.

D. INSTITUTIONAL ALLOCATIONS

The Commission shall allocate to each eligible institution a share of the total funds appropriated for the Part-Time Grant Program in proportion to its share of Maryland undergraduate

part-time students who demonstrate financial need and who are enrolled in degree-granting programs.

For purposes of apportioning funds, the Commission shall estimate the number of eligible students based on the percent of Maryland part-time undergraduate enrollment and percent of Maryland Pell recipients at each institution as follows:

Estimated Maryland Part-time Pell Recipients	=	$\frac{\text{Total Part-timeUndergraduate Maryland Residents}}{\text{Total MD UndergraduateHeadcount}} \times \text{Total Number ofMD Pell Recipients}$
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Funds allocated to the institution shall be received into, and disbursed from, a separate financial aid account.

E. STUDENT AWARDS

1. The institutional financial aid office will identify the degree-seeking undergraduate, students who are eligible to receive the award.

- a. The minimum annual award is \$200.
- b. The maximum annual award is \$1,000.
- c. Recipients may hold a Part-Time Grant for a maximum of 8 years as long as the recipient continues to meet all eligibility requirements specified in Section F.

2. Awards may also be made to students who are dually enrolled in a secondary school or an eligible home-school program in the state and an institution of higher education.

- a. No more than 10% of the institution's annual allocation may be used to make awards to dually enrolled students.
- b. Each institution must establish specific guidelines for making the awards to dually enrolled students.
- c. Priority should be given to students who demonstrate financial need.

F. STUDENT ELIGIBILITY

1. To be considered for an award under this program as a part-time, degree-seeking undergraduate student, the recipient must:

- a. be enrolled as an undergraduate student for at least 6, but fewer than 12 undergraduate credits per academic term; and
- b. be a permanent resident of Maryland according to guidelines established by the Commission;
- c. be enrolled in an approved two-year or four-year undergraduate degree program;
- d. have applied for a Pell grant;
- e. demonstrate financial need according to the Federal Methodology as defined in Part F of Title IV of the Higher Education Act;
- f. not be in default of a Federal Family Education Loan nor owe a refund for any previous financial aid received;
- g. be in compliance with federal law regarding Selective Service Registration;
- h. pledge to remain drug-free during the term of the award; and
- i. maintain satisfactory academic progress according to the standards of the institution.

2. Dually enrolled students

- a. To be considered for an award under this program as a dually enrolled student, the recipient
 - i. be dually enrolled in a secondary school or an eligible home-school program in the state and an institution of higher education;
 - ii. be a permanent resident of Maryland according to guidelines established by the Commission;
 - iii. meet any other conditions for the award as established by the institution.
- b. This section does not supercede policies or guidelines that institutions of higher education may already follow regarding home school students.

G. DISBURSEMENT AND REALLOCATION OF FUNDS

Each institution is responsible for awarding its allocation to eligible students. If an institution is unable to award all of its funds for a fiscal year, the remaining funds shall be returned to the Commission by March 15 for reallocation to other institutions.

H. AUDIT

Each participating institution must submit to the Commission by October 15 each year the following information.

1. Amount of funds awarded to part-time, degree-seeking undergraduate students and to dually enrolled students.
2. Number of awards to part-time, degree-seeking undergraduate students and to dually enrolled students.
3. Total number of eligible part-time, degree-seeking undergraduate students.
4. Total number of dually enrolled students.
5. Total number of undergraduate Maryland residents enrolled in degree programs who are carrying less than 6 credits for one or more academic terms.

All financial books, records and documents pertaining to this grant shall, at all reasonable times, be opened to inspection, review and audit by the Commission, the State Auditor or their authorized representatives. The institution shall retain such financial books, records, and documents for 5 years after close of fiscal year.

Institutions are required to include this program in any independent audit conducted for the institution on financial aid programs.

MARYLAND HIGHER EDUCATION COMMISSION
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR THE

~~HEALTH MANPOWER SHORTAGE PROGRAM—
NON RESIDENT TUITION REDUCTION FOR
NURSING STUDENTS ATTENDING COMMUNITY COLLEGES~~

NONRESIDENT NURSING STUDENT TUITION REDUCTION AND
STATE AID PROGRAM - COMMUNITY COLLEGES

APPROVED: MAY 17, 1995
REVISED AND SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION
Office of Student Financial Assistance

~~Guidelines for the Health Manpower Shortage Program—~~
~~Non Resident Tuition Reduction for Nursing Students Attending~~
~~Community Colleges~~
Nonresident Nursing Student Tuition Reduction and State Aid Program-
Community Colleges

AUTHORITY

~~The Health Manpower Shortage Program—Non Resident Tuition Reduction for Community Colleges, herein known as Health Manpower Shortage Program,~~ Nonresident Nursing Student Tuition Reduction and State Aid Program-Community Colleges (herein known as the Nonresident Student Tuition Reduction Program) was enacted into law by the Maryland General Assembly in 1988 and subsequently amended (Annotated Code, Education Article, Section 16-310). Under law (Annotated Code, Education Article, Section 18-110), the Maryland Higher Education Commission has the authority to establish regulations for the administration of programs and has the authority to review and investigate each bond given by the recipient of a scholarship, and if it determines that the recipient has failed or refused to comply with the conditions of the bond refer the matter to the Attorney General.

A. PURPOSE

The purpose of the ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program is to attract out-of-state students to nursing programs in participating Maryland public community colleges and to reduce the shortage of nurses in Maryland by requiring the recipients of the Program to work in a Maryland hospital or related institution (see **E. Awarding Obligations** for definition) for at least two years on a full-time basis upon completion of their nursing degree.

B. ELIGIBILITY

To be eligible for the ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program, an individual must:

1. be a resident of a state other than Maryland;
2. provide proof of acceptance into a Maryland community college registered or licensed practical nursing program; and
3. be registered at a Maryland community college for a minimum of six credits per semester.

3. be registered at a Maryland community college for a minimum of six credits per semester.

Currently enrolled nursing students may participate in the Program.

C. APPLICATION PROCEDURES

Completion of a specific application form and certification of acceptance into a Maryland community college registered or licensed practical nursing program is required for the ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program. The application forms are available from the community college nursing program's administrative office and the college's financial aid office.

D. AMOUNT OF ASSISTANCE

The amount of assistance under the ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program shall be the difference between the amount of tuition paid by an out-of-state student and the amount paid by an in-county student at the same community college in the same educational program for the identical number of credit hours. The amount of assistance will be known as tuition differential.

E. AWARDING OBLIGATIONS

After the community college has agreed to allow the student to participate in the ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program, the recipient is obligated to:

1. furnish a copy of the completed application to the Maryland Higher Education Commission, Office of Student Financial Assistance (herein after Maryland Office of Student Financial Assistance);
2. sign a surety bond or promissory note with the Maryland Office of Student Financial Assistance which states that the student, upon completion of the nursing program, will sit for licensure as a registered nurse or a licensed practical nurse; and
3. work for at least two years on a full-time basis in a Maryland hospital or related institution. A related institution is defined as an organized institution, environment, or home that:
 - a. maintains conditions or facilities and equipment to provide domiciliary, personal, or nursing care for two or more unrelated individuals who are dependent on the administrator, operator, or proprietor for nursing care or the subsistence of daily living in a safe, sanitary, and healthful environment; and

- b. admits or retains the individuals for overnight care. (Annotated Code of Maryland, Health General Article, Section 19-301).

F. RENEWAL AND CONTINUATION

The ~~Health Manpower Shortage Program~~Nonresident Student Tuition Reduction Program may be renewed on an annual basis if the recipient:

1. remains enrolled in the nursing program;
2. makes satisfactory academic progress according to the standards of the community college attended; and
3. continues to meet all other eligibility requirements.

G. SERVICE OBLIGATION

Repayment of the ~~Health Manpower Shortage Program~~Nonresident Student Tuition Reduction Program tuition differential is waived when the recipient of Program performs the service obligation. Service obligation is defined as working as either a licensed registered or licensed practical nurse for at least two years on a full-time basis, as defined by the employer, in a Maryland hospital or related institution. The recipient of this Program has six months from the date of graduation to begin the service obligation.

Any recipient of a tuition differential under this program who is not fulfilling his/her service obligation under the program 18 months after completing the nursing education program for which the student financial assistance was given, and has not already received a deferment of the service obligation or begun repayment of the student financial assistance, may be subject to disciplinary action by the State Board of Nursing which may deny a nursing license, place any licensee on probation, or suspend or revoke the recipient's nursing license.

H. TRACKING OF GRADUATED STUDENTS

Upon graduation from the eligible nursing program, all recipients of the ~~Health Manpower Shortage Program~~Nonresident Student Tuition Reduction Program must inform the Maryland Office of Student Financial Assistance of future employment plans. A recipient must complete the ~~Health Manpower Shortage Program~~Nonresident Student Tuition Reduction Program Questionnaire and if employed, further verification is then obtained from the employer's personnel office. Failure to return this questionnaire will invoke repayment of the tuition differential.

I. REVOCATION OF PARTICIPATION IN THE PROGRAM

The ~~Health Manpower Shortage Program~~Nonresident Student Tuition Reduction Program assistance will be revoked if the recipient:

1. transfers between eligible community colleges without prior notification to the Maryland Office of Student Financial Assistance;
2. transfers to an ineligible community college; ~~(one that does not participate in the Health Manpower Shortage Program);~~
3. changes to an education program that does not lead to licensure as a registered or licensed practical nurse;
4. no longer complies with institutional standards of satisfactory academic progress;
5. is enrolled for less than six credits; or
6. becomes a resident of Maryland.

If revocation occurs due to the above conditions, repayment of the tuition differential will not be invoked unless the recipient fails to obtain licensure as a registered or licensed practical nurse or fails to fulfill the service obligation.

J. REPAYMENT OF THE TUITION DIFFERENTIAL BY RECIPIENT

A recipient will be required to repay the total amount of tuition differential if the recipient:

1. fails to make satisfactory academic progress toward the appropriate degree;
2. fails to receive the appropriate degree at program termination;
3. transfers to a postsecondary institution that is not a Maryland community college or offering an approved program of study in nursing;
4. fails to obtain the appropriate Maryland nursing licensure;
5. has the license revoked during the period of the service obligation;
6. fails to perform the required service for the required amount of time on a full-time basis at an eligible hospital or related institution; or
7. otherwise fails to carry out the obligations of the ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program.

Interest on the funds advanced is an interest rate equal to and matching the interest rate established by the United States Department of Education for the Federal Stafford Loan on the first day of July of each year (enacted by the Maryland General Assembly October 1, 2000), with interest not accruing prior to notification to the Commission of a recipient's graduation or termination from an institution of higher education. Repayment of the grant is waived at the rate of

one academic year for each calendar year the recipient performs the service obligation. The repayment schedule is established by the Office of Student Financial Assistance, and payment must be completed within 6 years after repayment begins.

K. WAIVER OR DEFERMENT OF SERVICE OBLIGATION

Recipients are required to seek employment aggressively in all regions of the State in which employment opportunities exist in nursing at eligible hospitals and related institutions.

1. Deferment

a. Eligibility - A recipient is not considered in violation of the service obligation during the time the recipient is:

- (1) engaging in a full- or at least half-time course of study directly related to nursing at an institution of higher education;
- (2) on approved temporary leave of absence from eligible full-time employment as a licensed registered or licensed practical nurse for a period not to exceed thirty days;
- (3) temporarily totally disabled for a period not to exceed three years (36 months);
- (4) unable to secure employment for a period not to exceed twelve months by reason of the care required by a family member who is disabled; or
- (5) seeking and unable to find full-time employment as a licensed registered or licensed practical nurse in an eligible hospital or related institution for a single period not to exceed one year (12 months).

b. Documentation - To qualify for any of the exceptions a recipient shall notify the Office of Student Financial Assistance in writing of the recipient's claims to the exemption and provide supporting documentation. Such documentation shall consist of:

- (1) certification by the office of the registrar if the recipient has returned to a full- or at least half-time course of study directly related to nursing at an eligible institution of postsecondary education;
- (2) certification by the employer that the recipient is on a temporary approved leave of absence from full-time nursing employment;

- (3) a sworn affidavit by a qualified physician that the recipient is temporarily totally disabled;
 - (4) a sworn affidavit of a qualified physician that the recipient is unable to find full-time employment as a nurse by reason of the care required by a family member who is disabled; or
 - (5) a certified statement including a list of possible eligible employers with their addresses and telephone numbers to which application has been made if the recipient has been unable to find full-time employment as a registered or licensed practical nurse.
- c. Evaluation of Documentation - The Maryland Office of Student Financial Assistance shall review all documentation to ensure that at least one of the deferment conditions has been met. Before a deferment based on inability to find employment in nursing is granted, the Maryland Office of Student Financial Assistance shall review the documentation for evidence that the recipient has sought employment aggressively in all regions of the State in which eligible employment opportunities exist in nursing.

2. Waiver

- a. Eligibility - The Office of Student Financial Assistance shall waive a recipient's obligation for repayment if it determines:
 - (1) on the basis of the sworn affidavit of a qualified physician, that the recipient is unable to perform the service obligation on a full-time basis because of an impairment that is expected to continue indefinitely or result in death; or
 - (2) on the basis of a death certificate or other evidence of death that is conclusive under State law, that the recipient has died.
- b. In the event of death of the recipient, the estate, heirs, etc. shall not be required to repay any of the obligation of this assistance to the Maryland Office of Student Financial Assistance.

L. DETERMINATION OF NURSING SHORTAGE

The ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program shall be offered provided that the Secretary of Health and Mental Hygiene determines that a shortage of nurses exists in Maryland hospitals and related institutions.

Should the Secretary of Health and Mental Hygiene determine that a shortage of nurses no longer exists, the acceptance of new recipients of ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program shall cease. However, any nursing

student who already is participating in the program and otherwise remains eligible will be able to continue in the Program until graduation.

M. ANNUAL REPORT BY SCHOOL TO THE OFFICE OF STUDENT FINANCIAL ASSISTANCE

Each community college in which recipients of ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program are enrolled shall report to the Office of Student Financial Assistance no later than July 31st of each year the following information about each recipient for the previous academic year (July 1st to June 30th):

1. The recipient's name, social security number, current address and telephone number;
2. Certification that the recipient:
 - a. was in good academic standing and completed at least six credits per semester in an education program leading to licensure as a registered or practical nurse during the previous academic year;
 - b. has completed the nursing program; or
 - c. was no longer enrolled in the nursing program; and
3. The total dollar amount of the ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program for the previous academic year.

N. ANNUAL REPORT TO THE LEGISLATIVE POLICY COMMITTEE

The Maryland Higher Education Commission will report to the Legislative Policy Committee on an annual basis the total number of participants in the program and the status of participants who are serving their obligation and who are in repayment. This report will be issued in January of each year.

O. RECIPIENT WHO ENTERED THE PROGRAM PRIOR TO JULY 1, 1989

Recipients of ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program who entered the program prior to July 1, 1989, shall be subject to the guidelines appearing above except:

1. they shall have 4 years from the date of graduation from a nursing program in which to complete the service obligation; and
2. the repayment amount shall be that stated on the original bond or promissory note.

MARYLAND HIGHER EDUCATION COMMISSION
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR THE

~~HEALTH MANPOWER SHORTAGE PROGRAM—
NON RESIDENT TUITION REDUCTION FOR
NURSING STUDENTS ATTENDING FOUR YEAR PUBLIC INSTITUTIONS~~

NONRESIDENT NURSING STUDENT TUITION
REDUCTION AND STATE AID PROGRAM—
4-YEAR PUBLIC INSTITUTIONS

APPROVED: MAY 17, 1995
REVISED AND SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION
Office of Student Financial Assistance

Guidelines for the ~~Health Manpower Shortage Program—~~
~~Non-Resident Tuition Reduction for Nursing Students Attending~~
~~Four Year Public Institutions~~ Nonresident Nursing Student Tuition
Reduction and State Aid Program:
4-year Public Institutions

AUTHORITY

The ~~Health Manpower Shortage Program—~~ Non-Resident Tuition Reduction for
Nursing Students Attending Four year Public Institutions Nonresident Nursing Student Tuition
Reduction and State Aid Program: 4-year Public Institutions, herein known as ~~Health-~~
~~Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program, was enacted into
law by the Maryland General Assembly in 1988. Under law (Annotated Code, Education
Article, Section 18-110), the Maryland Higher Education Commission has the authority to
establish regulations for the administration of programs and has the authority to review and
investigate each bond given by the recipient of a scholarship, and if it determines that the
recipient has failed or refused to comply with the conditions of the bond refer the matter to the
Attorney General.

A. PURPOSE

The purpose of the ~~Health Manpower Shortage Program~~ Nonresident Student Tuition
Reduction Program is to attract out-of-state students to nursing programs in Maryland four-year
public institutions and to reduce the shortage of nurses in Maryland by requiring the participants
in the Program to work in a Maryland hospital or related institution (see Section E.
AWARDING OBLIGATIONS for definition) for at least four years on a full-time basis upon
completion of their nursing degree.

B. ELIGIBILITY

To be eligible for the ~~Health Manpower Shortage Program~~ Nonresident Student Tuition
Reduction Program, an individual must:

1. be a resident of a state other than Maryland;
2. provide proof of acceptance into a Maryland four-year public institution nursing
program ~~that leads to a Bachelor of Science Nursing degree~~; and

3. be registered at a Maryland four-year public institution for a minimum of six credits per semester.

Currently enrolled nursing students may participate in this program.

C. APPLICATION PROCEDURES

Completion of a specific application form and certification of acceptance into a Maryland four-year public institution nursing program is required for the ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program. The application forms are available from the institution's nursing program administrative office and the financial aid office.

D. AMOUNT OF ASSISTANCE

The amount of assistance under the ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program shall be the difference between the amount of tuition paid by an out-of-state student and the amount paid by an in-state student at the same four-year public institution in the same educational program for the identical number of credit hours. The amount of assistance will be known as tuition differential.

E. AWARDING OBLIGATIONS

After the student has applied to the four-year public institution for participation in the ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program, the recipient is obligated to:

1. furnish a copy of the completed application to the Office of Student Financial Assistance;
2. sign a surety bond or promissory note with the Office of Student Financial Assistance stating that the student, upon completion of the nursing program, will sit for licensure as a registered or practical nurse; and
3. work for at least four years in a Maryland hospital or related institution. A related institution is defined as an organized institution, environment, or home that:
 - a. maintains conditions or facilities and equipment to provide domiciliary, personal, or nursing care for two or more unrelated individuals who are dependent on the administrator, operator, or proprietor for nursing care or the subsistence of daily living in a safe, sanitary, and healthful environment; and

- b. admits or retains the individuals for overnight care. (Annotated Code of Maryland, Health General Article, Section 19-301).

F. RENEWAL AND CONTINUATION

The ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program may be renewed on an annual basis if the recipient:

1. remains enrolled in the nursing program;
2. makes satisfactory academic progress according to the standards of the four-year public institution attended; and
3. continues to meet all other eligibility requirements.

G. SERVICE OBLIGATION

Repayment of the ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program tuition differential is waived when the participant performs the service obligation. Service obligation is defined as working as a licensed registered or practical nurse for at least four years on a full-time basis, as defined by the employer, in a hospital or related institution. The recipient of this Program has six months from the date of graduation to begin the service obligation.

Any recipient of a tuition differential under this program who is not fulfilling his/her service obligation under the program 18 months after completing the nursing education program for which the student financial assistance was given, and has not already received a deferment of the service obligation or begun repayment of the student financial assistance, may be subject to disciplinary action by the State Board of Nursing which may deny a nursing license, place any licensee on probation, or suspend or revoke the recipient's nursing license.

H. TRACKING OF GRADUATE STUDENTS

Upon graduation from the eligible nursing program, all recipients of the ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program must inform the Office of Student Financial Assistance of future employment plans. A recipient must complete the ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program Questionnaire and if employed, further verification is then obtained from the employer's personnel office. Failure to return this questionnaire will invoke repayment of the tuition differential.

I. REVOCATION OF PARTICIPATION IN THE PROGRAM

The ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program assistance will be revoked if the recipient:

1. transfers between eligible four-year public institutions without prior written notification to the Office of Student Financial Assistance;
2. transfers to an ineligible institution;
3. changes to an education program that does not lead to licensure as a registered or practical nurse;
4. no longer complies with institutional standards of satisfactory academic progress;
5. is enrolled for less than six credits; or
6. becomes a resident of Maryland as defined by the Commission.

If revocation occurs, repayment of the tuition differential will not be invoked unless the recipient fails to obtain licensure as a registered or practical nurse or fails to fulfill the service obligation.

J. REPAYMENT OF THE TUITION DIFFERENTIAL BY RECIPIENT

A recipient will be required to repay the total amount of tuition differential if the recipient:

1. fails to make satisfactory academic progress as defined by the institution toward the appropriate degree;
2. fails to receive the appropriate degree at program termination;
3. transfers to a postsecondary institution that is not a four-year public institution offering an approved program of study in nursing;
4. fails to obtain the appropriate Maryland nursing licensure;
5. has the license revoked during the period of the service obligation;
6. fails to perform the required service for the required amount of time on a full-time basis at an eligible hospital or related institution; or
7. otherwise fails to carry out the obligations of the ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program.

Interest on the funds advanced is an interest rate equal to and matching the interest rate established by the United States Department of Education for the Federal Stafford Loan on the first day of July of each year (enacted by the Maryland General Assembly October 1, 2000), with interest not accruing prior to notification to the Commission of a recipient's graduation or termination from an institution of higher education. Repayment of the grant is waived at the rate of one academic year for each calendar year the recipient performs the service obligation. The repayment schedule is established by the Office of Student Financial Assistance, and payment must be completed within 6 years after repayment begins.

K. WAIVER OR DEFERMENT OF SERVICE OBLIGATION

Recipients are required to seek employment aggressively in all regions of the State in which employment opportunities exist in nursing at eligible hospitals and related institutions.

1. Deferment

a. Eligibility - A recipient is not considered in violation of the service obligation during the time the recipient is:

- (1) engaging in a full- or at least half-time course of study directly related to nursing at an institution of higher education;
- (2) on approved temporary leave of absence from eligible full-time employment as a licensed registered or practical nurse for a period not to exceed ninety days;
- (3) temporarily totally disabled for a period not to exceed three years (36 months);
- (4) unable to secure employment for a period not to exceed twelve months by reason of the care required by a family member who is disabled; or
- (5) seeking and unable to find full-time employment as a licensed registered or practical nurse in an eligible hospital or related institution for a single period not to exceed one year (12 months). Deferment for this reason is renewable at the discretion of the Office of Student Financial Assistance.

b. Documentation - To qualify for any of the exceptions a recipient shall notify the Office of Student Financial Assistance in writing of the recipient's claims to the exemption and provide supporting documentation. Such documentation shall consist of:

- (1) certification by the office of the registrar if the recipient has returned to a full- or at least half-time course of study directly related to nursing at an eligible institution of postsecondary education;
 - (2) certification by the employer that the recipient is on a temporary approved leave of absence from full-time nursing employment;
 - (3) a sworn affidavit by a qualified physician that the recipient is temporarily totally disabled;
 - (4) a sworn affidavit of a qualified physician that the recipient is unable to find full-time employment as a nurse by reason of the care required by a family member who is disabled; or
 - (5) a certified statement including a list of possible eligible employers with their addresses and telephone numbers to which application has been made if the recipient has been unable to find full-time employment as a licensed registered or practical nurse.
- c. Evaluation of Documentation - The Office of Student Financial Assistance shall review all documentation to ensure that at least one of the deferment conditions has been met. Before a deferment based on inability to find employment in nursing is granted, the Office of Student Financial Assistance shall review the documentation for evidence that the recipient has sought employment aggressively in all regions of the State in which eligible employment opportunities exist in nursing.

2. Waiver

- a. Eligibility - The Office of Student Financial Assistance shall waive a recipient's obligation for repayment if it determines:
- (1) on the basis of the sworn affidavit of a qualified physician, that the recipient is unable to perform the service obligation on a full-time basis because of an impairment that is expected to continue indefinitely or result in death; or
 - (2) on the basis of a death certificate or other evidence of death that is conclusive under State law, that the recipient has died.
- b. In the event of death of the recipient, the estate, heirs, etc. shall not be required to repay any of the obligation of this assistance to the Office of Student Financial Assistance.

L. DETERMINATION OF NURSING SHORTAGE

The ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program shall be offered provided that the Secretary of Health and Mental Hygiene determines that a shortage of nurses exists in Maryland hospitals and related institutions.

Should the Secretary of Health and Mental Hygiene determine that a shortage of nurses no longer exists, the acceptance of new recipients of ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program shall cease. However, any nursing student who already is participating in the program and otherwise remains eligible will be able to continue in the Program until graduation.

M. ANNUAL REPORT BY SCHOOL TO THE STATE SCHOLARSHIP ADMINISTRATION

Each four-year public institution shall report to the Office of Student Financial Assistance no later than July 31st of each year the following information about each recipient for the previous academic year (July 1st to June 30th):

1. The recipient's name, social security number, current address and telephone number;
2. Certification that the recipient:
 - a. was in good academic standing and completed at least six credits per semester in an education program leading to licensure as a registered or practical nurse during the previous academic year,
 - b. has completed the nursing program, or
 - c. was no longer enrolled in the nursing program; and
3. The total per student dollar amount of the ~~Health Manpower Shortage Program~~ Nonresident Student Tuition Reduction Program for the previous academic year..

N. ANNUAL REPORT TO THE LEGISLATIVE POLICY COMMITTEE

The Maryland Higher Education Commission shall report annually to the Legislative Policy Committee on the total number of participants in the tuition reduction program and the status of graduates with an outstanding obligation for work within the State or repayment of tuition reduction under the Annotated Code, Education Article, Section 18-109.

MARYLAND HIGHER EDUCATION COMMISSION

OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR THE

EDWARD T. CONROY MEMORIAL SCHOLARSHIP PROGRAM

APPROVED: JUNE 2002

REVISED & SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION

Office of Student Financial Assistance

Guidelines for the Edward T. Conroy Memorial Scholarship Program

AUTHORITY

The Edward T. Conroy Memorial Scholarship Program (Annotated Code of Maryland - Education Article Section 18-601) was consolidated with two other memorial scholarship programs in the 1990 Maryland General Assembly session. Under law (Annotated Code of Maryland - Education Article Section 18-204), the Maryland Higher Education Commission has the authority to establish regulations for the administration of this program.

A. PURPOSE

The Edward T. Conroy Memorial Scholarship Program is designed to provide financial assistance to sons and daughters of deceased, missing in action or prisoner of war United States armed forces personnel, sons and daughters of deceased public safety personnel, surviving spouses who have not remarried of deceased public safety personnel, disabled public safety personnel and sons, daughters and/or surviving spouses of victims of the September 11, 2001 terrorist attacks, attending a Maryland postsecondary institution.

B. ELIGIBILITY

To be eligible for the Edward T. Conroy Scholarship Program, an individual must attend a Maryland postsecondary institution on at least a part-time basis and be one of the following:

1. a son or daughter at least 16 years old, whose parent:
 - a. served in the United States Armed Forces after December 7, 1941 and was a Maryland resident at the time the parent died or was totally and permanently disabled as a result of military service;
 - b. was a Maryland resident at the time the parent was declared to be a prisoner of war or missing in action as a result of the Vietnam Conflict; ~~or~~
 - c. was a State or local public safety employee killed in the line of duty;
 - d. was a prisoner of war as a result of the Vietnam Conflict on or after January 1, 1960 and was a resident of Maryland at the time the applicant was declared to be a prisoner of war or missing in action; or

- e. was a victim of the September 11, 2001 terrorist attacks.
- 2. a surviving spouse (a person who has not remarried) of a State or local public safety employee killed in the line of duty or a victim of the September 11, 2001 terrorist attacks; or
- 3. a 100 percent disabled public safety employee; or
- 4. a Veteran who suffers a service-related disability of 25% or greater; and who has exhausted or is no longer eligible for federal veteran's educational benefits.

Definitions:

A state or local public safety employee is defined as a person who is:

- 1. a career or volunteer member of a fire department, ambulance/rescue company or squad;
- 2. a law enforcement officer;
- 3. a correctional officer; or
- 4. a Maryland resident who was a member of the Maryland National Guard at the time of death.

A disabled public safety employee is defined as a state or local public safety employee who sustains an injury in the line of duty that precludes the individual from continuing to serve or be employed as a state or local public safety employee.

In the case of a volunteer member of a fire department, ambulance/rescue squad or company, the disability must preclude the member from continuing to be employed in a nonpublic safety occupation in which the member was engaged at the time of injury.

A victim of the September 11, 2001 terrorist attacks is defined as a Maryland resident who was killed as a result of the attacks on the World Trade Center in New York City, the attack on the Pentagon in Virginia, or the crash of United Airlines flight #93 in Pennsylvania on September 11, 2001.

C. AWARD AMOUNT

The annual award may not exceed the equivalent annual tuition and mandatory fees of a resident undergraduate at a four-year public institution of higher education within the University System of Maryland, other than the University of Maryland University College and the University of Maryland, Baltimore, with the highest annual expenses for a full-time resident undergraduate.

Awards to the sons, daughters or spouses of victims of the September 11, 2001 terrorist attacks may not exceed the amount specified above when combined with any other scholarships received by a student based on the student's status as a child or spouse of a victim of the September 11, 2001 terrorist attacks.

D. APPLICATION PROCEDURES

Completion of a specific program application form is required for the Edward T. Conroy Memorial Scholarship Program. The application form is available from the Office of Student Financial Assistance.

~~Application procedures differ for new applicants and renewal applicants. If a student has already received an award, or has previously completed a new application form, a re-application form is filed. If a student has never filed an application with the Office of Student Financial Assistance for the Edward T. Conroy Scholarship Program, then a new application form is necessary.~~

~~1. New Application Procedures~~To apply, a student must provide:

~~Students applying for the first time must provide:~~

~~1.a.~~ — a completed Application Form;

~~2.b.~~ if a child is applying, a birth certificate showing the names of both parents;

~~3.e.~~ if a spouse is applying, a marriage certificate; and

~~4.d.~~ official verification from:

- a. the United States Veterans Administration if the applicant's parent was killed, or totally disabled as a result of military service or is a prisoner of war or missing in action;
- b. the United States Veterans Administration if the applicant is a Veteran who suffers a service-related disability of 25% or greater; and who has exhausted or is no longer eligible for federal veteran's educational benefits;
- c. the state or local public safety personnel office if the applicant's spouse was killed in the line of duty;
- d. the state or local public safety personnel office if the applicant's parent was killed in the line of duty;

- e. the state or local public safety personnel office if the applicant is a disabled public safety employee; or
- f. the nonpublic safety employer and the local public safety personnel office if the disability was a result of service while the applicant was a volunteer member of a fire department, ambulance/rescue squad or company; or
- g. a copy of the death certificate that shows date, location and/or cause of death to have been as a result of the attacks on the World Trade Center, the Pentagon or the crash of United Airlines Flight #93 on September 11, 2001.

New applicants will be encouraged to apply by July 15 of each year, but applications will be accepted throughout the year. Awards will be made to students who apply after July 15 on a rolling basis as long as funds are available.

~~2. Re-application Procedures~~

~~Students applying who have applied previously and were deemed eligible for the Edward T. Conroy Memorial Scholarship Program must complete a reapplication form and return it to the Office of Student Financial Assistance by July 15 each year.~~

~~Re-applications will be accepted on a continuous basis as long as funds are available.~~

E. AWARDING PROCEDURES

Eligible applicants who receive the Edward T. Conroy Memorial Scholarship will be notified of the award in writing. In order to accept an award, a recipient must provide the Office of Student Financial Assistance with a written acceptance of the award.

The Office of Student Financial Assistance may not award more than 15 scholarships annually to Veterans who suffer from a service-related disability of 25% or greater.

F. PAYMENT

Payment is made directly to the institution the applicant is attending. At the beginning of each school term, institutions will be asked to review Billing Rosters provided by the Office of Student Financial Assistance to certify that the recipient is enrolled.

Upon receipt of the institution's certification, the Office of Student Financial Assistance will disburse the adjusted amount to be credited to the student's account.

G. RENEWAL AND CONTINUATION

An Edward T. Conroy Memorial Scholarship Program may be renewed on an annual basis for up to five years of full-time study or eight years of part-time study if the recipient:

1. is enrolled on at least a part-time basis in an eligible Maryland postsecondary institution; and
2. continues to meet all other eligibility requirements.

H. REVOCATION OF AWARD

An award will be revoked if any of the criteria stated in section F - Payment and section G - Renewal and Continuation are not met, or if the recipient makes any changes to name, address or any other information pertinent to the Edward T. Conroy Memorial Scholarship Program and fails to inform the Office of Student Financial Assistance in writing.

I. APPEAL PROCEDURES

Appeals to decisions of ineligibility or revocation of an award are made to the Director of the Office of Student Financial Assistance. All appeals must:

1. be in writing;
2. be submitted within thirty (30) days of notice of ineligibility or cancellation of award; and
3. detail reasons and/or circumstances that would justify reversal of the original decision.

The Director will review each case and issue a decision no later than forty-five (45) days after receiving the appeal. All decisions of the Director are final.

MARYLAND HIGHER EDUCATION COMMISSION

OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR THE

~~DEVELOPMENTAL DISABILITIES AND MENTAL HEALTH WORKFORCE TUITION-
ASSISTANCE PROGRAM~~DEVELOPMENTAL DISABILITIES, MENTAL HEALTH, CHILD
WELFARE, AND JUVENILE JUSTICE WORKFORCE TUITION ASSISTANCE PROGRAM

APPROVED: JUNE 2002
REVISED & SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION

Office of Student Financial Assistance

Guidelines for the

~~Developmental Disabilities and Mental Health Workforce~~

~~Tuition Assistance Program~~

DEVELOPMENTAL DISABILITIES, MENTAL HEALTH, CHILD WELFARE, AND
JUVENILE JUSTICE WORKFORCE TUITION ASSISTANCE PROGRAM

AUTHORITY

This program of tuition assistance was enacted by the 1999 Maryland General Assembly. This law, codified in the Annotated Code, Education Article, §18-2101, gives the Maryland Higher Education Commission the authority to adopt guidelines or regulations to administer this program.

A. Purpose

The purpose of this program is to establish a program of tuition assistance to certain individuals who are employees or agree to work as employees of community-based programs serving individuals with certain disabilities or those under the supervision of the Department of Social Services or the Department of Juvenile Justice.

B. Eligibility

A recipient of the ~~Developmental Disabilities and Mental Health Workforce Tuition Assistance~~ Developmental Disabilities, Mental Health, Child Welfare, and Juvenile Justice Workforce Tuition Assistance Program must:

1. be a Maryland resident;
2. be a U.S. citizen or eligible non-citizen;
3. possess a high school diploma or its equivalent;
4. intend to enroll as a full or part-time student in a degree program in human services, be accepted for admission as a full or part-time student in an eligible institution of higher education in Maryland;
5. submit an appropriately completed ~~Developmental Disabilities and Mental Health Workforce Tuition Assistance Program~~ Developmental Disabilities, Mental

Health, Child Welfare, and Juvenile Justice Workforce Tuition Assistance Program application to the Office of Student Financial Assistance by July 1; and

6. Agree to work in a community-based program that serves individuals with developmental disabilities; mental health disorders; or children in the custody of a local Department of Social Services or Department of Juvenile Justice; or any residential child care program licensed by the Department of Human Resources or the Department of Juvenile Justice for a total of: 4

- 1) 2000 hours if the award received totals \$1999 or less;
- 2) 3000 hours of service if the award amount is \$2000 - \$3999; and
- 3) 4000 hours of service if the award amount is \$4000 or more, or repay the State if the service obligation is not performed.

C. Application Process

Applicants must apply for the Developmental Disabilities, Mental Health, Child Welfare, and Juvenile Justice Workforce Tuition Assistance Program ~~Developmental Disabilities and Mental Health Workforce Tuition Assistance~~ by completing the application form provided by the Office of Student Financial Assistance, and filing by July 1. Applications are available from the Office of Student Financial Assistance and from certain eligible employers.

D. Award Amount

The ~~Developmental Disabilities and Mental Health Workforce Tuition Assistance~~ Developmental Disabilities, Mental Health, Child Welfare, and Juvenile Justice Workforce Tuition Assistance Program may be used for tuition and fees, room and board, and books and supplies. A student may receive assistance up to \$100 per credit hour. The amount of assistance may not exceed:

1. \$2,000 in any one academic year for a student enrolled in a 2-year program; \$500 per semester if enrolled part-time or \$1000 per semester if enrolled full-time.
2. \$3,000 in any one academic year for a student enrolled in a program leading to a bachelor's degree; \$750 per semester if enrolled part-time or \$1500 per semester if enrolled full-time.
3. Tuition assistance for each recipient may be used for a period of no more than 5 years and may not exceed \$6000.

E. Selection of Recipients

Applicants will be placed into one of two groups:

1. Applicants who currently work as direct service employees in community-based programs; or the Department of Social Services or the Department of Juvenile Justice. Seventy percent of funds will be awarded to this group.

2. Applicants who do not currently work as direct service employees in community-based programs or the Department of Social Services or the Department of Juvenile Justice. Thirty percent of funds will be awarded to this group.
3. Students not currently employed in eligible humans services fields will be ranked by cumulative GPA earned in any college courses or on a high school transcript if student has not earned college credits.
4. Any funds remaining in either applicant pool will be reallocated to meet the demands of the larger applicant pool after the initial awards are made.
5. An equal distribution between full and part time students will be made and an equal distribution between eligible sites as defined in section J if funds are insufficient to award all eligible applicants.

F. Award Notification

Recipients will be notified in writing of the tuition assistance award. In order to accept an award, the recipient must provide written acceptance of the award and must sign a promissory note and submit both to the Office of Student Financial Assistance by the date specified on the award notice.

G. Renewal and Continuation

~~Developmental Disabilities and Mental Health Tuition Assistance~~ Developmental Disabilities, Mental Health, Child Welfare, and Juvenile Justice Workforce Tuition Assistance Program may be renewed on an annual basis up to a maximum amount of \$6,000 or 5 years, if the recipient completes the application form and maintains satisfactory progress as established by the institution.

Tuition assistance will not be automatically ~~reviewed~~ renewed if the original award was canceled due to ineligible number of credits taken per semester, or failure to maintain satisfactory academic progress. A recipient who is academically ineligible will forfeit the award for one academic semester. The award will be reinstated, if funds are available, for the following academic semester upon proof of meeting institutional standards.

A student transferring from one institution to another may continue to receive the award as long as the student meets all of the eligibility requirements.

H. Revocation of Award

~~The Developmental Disabilities and Mental Health Workforce Tuition Assistance~~ Developmental Disabilities, Mental Health, Child Welfare, and Juvenile Justice Workforce Tuition Assistance Program will be canceled if the student:

1. ceases to be a Maryland resident;

2. fails to enroll at a Maryland higher education institution in a degree program in human services;
3. fails to enroll as a full or part-time student;
4. fails to make satisfactory progress toward a degree; or
5. fails to maintain the standards of the institution.

I. Payment

Payment is made directly to the institution. At the beginning of each semester, the institution will be asked to review a billing roster provided by the Office of Student Financial Assistance to certify that the recipient:

1. is enrolled at the institution;
2. is enrolled in human services program; and
3. meets all other eligibility requirements established by the institution.

Upon receipt of the institution's certification, the Office of Student Financial Assistance will disburse funds to be credited to the student's account.

J. Service Obligation

Recipients are required to begin employment in the state within six months after completion of undergraduate studies. The recipient is required to work in a community-based program for a maximum 4,000 hours of continuous full or part-time employment as determined by the amount of funds received in section B (g) licensed by the Developmental Disabilities Administration or approved by the Mental Hygiene Administration to provide habilitation, rehabilitation, residential, or related community support services to individuals with developmental disabilities or mental disorders; or any residential child care program licensed by the Department of Human Resources or the Department of Juvenile Justice.

Upon graduation from an eligible human services program, the recipient must complete a questionnaire issued by the Office of Student Financial Assistance providing information on employment. Employment verification is obtained from the recipient's direct supervisor.

Prior employment in a community-based program may not be applied to the employment requirement. However, once an award has been received, concurrent employment in an eligible field will count toward the total hours required to complete the service obligation.

K. Repayment

A recipient will be required to repay the State if the recipient:

1. fails to earn at least 12 credit hours in each academic year, including the summer term, in which the student receives assistance;
2. fails to make satisfactory progress toward fulfilling all degree requirements of the institution or has been revoked in accordance with Section H;
3. fails to perform the service obligation for the required amount of time; or
4. to complete the questionnaire on performance of the service obligation.

The interest rate on amounts required to be repaid shall be calculated at an interest rate equal to and matching the interest rate established by the United States Department of Education for the Federal Stafford Loan on the first day of July of each year, with interest not accruing prior to notification to the Commission of a recipient's graduation or termination from an institution of higher education. The recipient will be required to begin repayment within 6 months of the date of failure to comply with the educational or employment requirements. The recipient must repay the State in full within 6 years after the repayment period begins, and shall follow a repayment schedule established by the State Scholarship Administration The Office of Student Financial Assistance.

L. Deferment or Waiver of the Service Obligation and Repayment

The Office of Student Financial Assistance may waive or defer repayment in the event of:

1. loss of employment during the period of required employment due to involuntary termination unrelated to the performance of the employee;
2. disability or extended illness which prevents the student from fulfilling either the educational or employment requirements; or
3. the student is unable to find employment within 6 months of graduation.

M. Funding

The funding for the ~~Developmental Disabilities and Mental Health Workforce Tuition Assistance Program~~ Developmental Disabilities, Mental Health, Child Welfare, and Juvenile Justice Workforce Tuition Assistance Program shall be as provided in the annual budget of the Commission and all awards are contingent upon the continued availability of such funding.

MARYLAND HIGHER EDUCATION COMMISSION
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES
FOR THE
TUITION REIMBURSEMENT OF
FIREMEN, AMBULANCE AND RESCUE SQUADMEN PROGRAM

APPROVED: OCTOBER 30, 1990
REVISED AND SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION
Office of Student Financial Assistance

Guidelines for the Tuition Reimbursement of
Firemen, Ambulance and Rescue Squadmen Program

AUTHORITY

The Tuition Reimbursement of Firemen, Ambulance and Rescue Squadmen Program was enacted by the 1957 Maryland General Assembly and amended by the General Assemblies of 1978, 1986, and 1988 (Annotated Code, Education Article, Section 18-605). Under law, (Annotated Code, Education Article, Section 18-204) the Maryland Higher Education Commission has the authority to establish rules and regulations for the administration of scholarship programs.

A. PURPOSE

The purpose of this tuition reimbursement program is to encourage members of fire fighting, ambulance, and rescue organizations serving Maryland communities to improve their professional skills by reimbursing them for the tuition costs of courses leading to a degree in fire service or emergency medical technology.

B. ELIGIBILITY

To be eligible for tuition reimbursement, an individual must:

1. be a career or active volunteer firefighter, ambulance and rescue squad member serving a Maryland community; and
2. attend a Maryland postsecondary institution that offers courses leading to a degree in fire service or emergency medical technology.

C. AMOUNT OF TUITION REIMBURSEMENT

The tuition reimbursement is the amount of tuition only for courses leading to a degree in fire service or emergency medical technology. The tuition reimbursement will not exceed the tuition cost for the same number and level of credit hours to an in-state, undergraduate student at the four-year public institution of higher education within the University System of Maryland, other than the University of Maryland University College and the University of Maryland, Baltimore, with the highest annual expenses for a full-time resident undergraduate, during the same term. If an applicant has received assistance from the Office of Student Financial Assistance, the amount received will be deducted from the amount of tuition paid.

D. APPLICATION PROCEDURES

Completion of a specific application form is required for this program. Application forms are available from the dean/director of the program or by contacting the Office of Student Financial Assistance.

Immediately following the end of the spring semester, an applicant must submit a completed application form for the previous summer, fall, winter, and spring semester(s)/term(s). The application deadline is July 1 of each year for tuition reimbursement for the previous academic year. If the applicant attended more than one Maryland postsecondary institution during a single academic year (July 1 to June 30), a separate application must be made for each school.

Students applying for tuition reimbursement must provide:

1. a completed application form;
2. an official college transcript showing all courses for which reimbursement is being claimed;
3. a tuition receipt, tuition statement, or other document acceptable by the Office of Student Financial Assistance showing the exact amount of tuition paid; and
4. proof of official acceptance in a program of fire service or emergency medical technology or a letter from an eligible education program that the credits will be accepted by the institution and credited towards a degree in fire service or emergency medical technology.

~~Once an application has been received, the State Scholarship Administration will obtain written confirmation from the Head of the fire, ambulance, or rescue organization to which the applicant belongs verifying the employment or active volunteer status of the applicant at the time the coursework was taken and verify that the applicant has maintained active employment or service 12 months after application.~~

~~The Office of Student Financial Assistance holds the application while the applicant performs the required service. Beginning July 1 of the following year, OSFA will obtain written confirmation of the applicant's employment or volunteer status from the head of the fire, ambulance, or rescue organization to which the applicant belongs. The applicant must have been a career or active volunteer firefighter, ambulance, or rescue squad member during the time coursework was taken and maintained employment or volunteer status for 12 consecutive months after the application was submitted.~~

E. QUALIFICATIONS

In order to receive tuition reimbursement, the applicant must have received at least a grade of "C" in any course specifically required for program completion. Applicants are eligible for tuition reimbursement for eligible courses taken on a "pass/fail" basis. However, applicants who have "dropped," "failed" or received an "incomplete" for a given course are not eligible for reimbursement of that course.

F. PAYMENT

Payment of the tuition reimbursement will be made directly to the applicant after their 12-month employment/service verification has been confirmed. If the fire, ambulance or rescue organization has paid for the applicant's coursework, payment of the tuition reimbursement is made in the applicant's name to the organization.

G. APPEALS

Appeals to decisions of ineligibility for tuition reimbursement are made to the Director of the Office of Student Financial Assistance. All appeals must:

1. be in writing; and
2. be submitted with thirty (30) days of notice of ineligibility or cancellation of award.

The Director will review each case and issue a decision no later than sixty (60) days after receiving the appeal. All decisions of the Director are final.

MARYLAND HIGHER EDUCATION COMMISSION

OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES

FOR THE

GRADUATE AND PROFESSIONAL SCHOLARSHIP PROGRAM

APPROVED: JUNE 2002

REVISED AND SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION
Office of Student Financial Assistance

Guidelines for the
Graduate and Professional Scholarship Program

AUTHORITY

The Graduate and Professional Scholarship Program was enacted into law by the Maryland General Assembly in 2002 (Annotated Code, Educational Article, Section 18-2601). Special funds for the program are provided under Transportation Article, Section 13-613. The Office of Student Financial Assistance has the authority to adopt rules and regulations to administer this program (Annotated Code, Educational Article, Section 18-2601).

A. PURPOSE

The purpose of the Graduate and Professional Scholarship Program is to provide financial assistance to full-time and part-time graduate/professional students in the fields of medicine, dentistry, law, pharmacy, nursing, social work, and veterinary medicine if the applicant has demonstrated financial need.

B. STUDENT ELIGIBILITY

To be eligible for the Graduate and Professional Scholarship Program an individual must:

1. be a Maryland resident;
2. demonstrate financial need; and
3. be enrolled as a degree-seeking student, either part-time or full-time and attend one of the following schools:
 - a. University of Maryland, Baltimore (UMB) Schools of Medicine, Dentistry, Law, Pharmacy, or Social Work;
 - b. University of Baltimore School of Law;
 - c. The Johns Hopkins University School of Medicine;
 - d. The Virginia-Maryland Regional College of Veterinary Medicine; or
 - e. Any Maryland institution offering a masters degree in Nursing or Social Work;

C. INSTITUTIONAL ELIGIBILITY

Institutions eligible to participate in the program are: University of Maryland, Baltimore, University of Baltimore, The Johns Hopkins University, Virginia-Maryland Regional College of Veterinary Medicine, and any institution of higher education in the State offering a Master's Degree in Nursing or Social Work.

D. INSTITUTIONAL ALLOCATIONS

The Commission shall allocate to each eligible institution a share of the total funds provided for the program in proportion to its share of Maryland graduate and professional students who are enrolled in the eligible programs as reported to the Commission.

The allocation shall be based on the average of the enrollments for the prior two years. Institutions will be notified by May 1 of the amount of their allocation and funds will be distributed to each institution after July 1.

E. STUDENT AWARDS

The institutional financial aid office will identify students who are eligible for an award.

The minimum award is \$1,000 per academic year and the maximum award is \$5,000 per academic year. No student may receive the award for longer than eight semesters regardless of enrollment status.

Awards shall be based on the financial need of the student. Students are required to file the Free Application for Federal Student Aid (FAFSA). Each institution may determine an appropriate methodology for determining financial need; this methodology should include consideration of the information provided on the FAFSA.

The award may be used toward the costs of tuition and mandatory fees, room and board, and other educational expenses.

F. RENEWAL CONDITIONS

To maintain eligibility for a Graduate and Professional Scholarship, the recipient must continue to demonstrate financial need for each year that the award is sought and meet all other eligibility criteria. A student may receive the award for a maximum of eight semesters, regardless of full or part-time status.

G. AUDIT

Each participating institution must submit to the Commission by October 15 each year the following information:

1. amount of funds and number of recipients awarded a Graduate and Professional Scholarship;

2. the allocation of awards and funds by each degree program;
3. total number of eligible students with financial need; and
4. the methodology used to determine the financial need of the students awarded under the program.

All financial books, records and documents pertaining to this grant shall, at all reasonable times, be opened to inspection, review and audit by the Commission, the State Auditor or their authorized representatives. The institution shall retain such financial books, records, and documents for 5 years after close of fiscal year.

Institutions are required to include this program in any independent audit conducted for the institution on financial aid programs.

MARYLAND HIGHER EDUCATION COMMISSION
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES
FOR THE
SENATORIAL SCHOLARSHIP PROGRAM

APPROVED: MAY 17, 1995
REVISED AND SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION
Office of Student Financial Assistance

Guidelines for the Senatorial Scholarship Program

AUTHORITY

The Senatorial Scholarship Program (Annotated Code of Maryland - Education Article Section 18-401) was enacted into law by the Maryland General Assembly in 1957 and was last amended in 1988. Under law (Annotated Code of Maryland - Education Article Section 18-204), the Maryland Higher Education Commission, in consultation with members of the Maryland Senate, has the authority to establish regulations for the administration of this program.

A. PURPOSE

The Senatorial Scholarship Program is designed so that Senators in the Maryland General Assembly can provide financial assistance to full- and part-time students pursuing an undergraduate, graduate or professional education.

B. ELIGIBILITY

To be eligible for a Senatorial Scholarship, the recipient must be a Maryland resident in the Senator's legislative district at the time the application is made. The recipient must be accepted for admission in the regular undergraduate, graduate, or professional program at an eligible institution or be enrolled in a two-year terminal certificate program in which the coursework is acceptable for transfer credit for an accredited baccalaureate program in an eligible institution. The recipient must also attend a Maryland college or university or an eligible out-of-state school for the number of credit hours for which the award was made. Full-time is defined as 12 credit hours per semester for undergraduates and 9 credit hours per semester for graduate students. Part-time is defined as 6 to 11 credits per semester for undergraduates and 6 to 8 hours for graduate students.

A student may also attend a private career school. Private career schools must:

1. have the Commission's approval to operate;
2. have the Commission's approval of the curriculum; and
3. be accredited by a national accrediting association approved by the United States Department of Education. Recipients may also attend a hospital nursing diploma school if the curriculum is approved by the Commission.

Applicants may also be eligible for assistance if they are going to school out-of-state and they are:

1. hearing impaired and attending an out-of-state institution that makes special provisions for hearing impaired students and comparable special provisions are not available to that student at a Maryland institution; and/or
2. enrolling in a program which is not offered in Maryland. This is referred to as applying for unique major status.
 - a. Applicants who will be/are attending an out-of-state school and believe that their program of study is not offered in Maryland must submit a request, in writing, to the Director of the Office of Student Financial Assistance that their major be identified as one not offered in the State for the purposes of applying for the Senatorial Scholarship program.
 - b. The letter should include the student's name, social security number, State legislative district and a copy of the relevant sections of the out-of-state institution's catalog. Once the letter is received, the Director will forward the request to the Division of Academic Affairs and a determination will be made. The Director will then notify the student of a decision within 45 days of receipt of the request.

C. AWARD AMOUNT

Each Senator may award the amount of the scholarship in dollar amounts between \$400 and \$2000 annually. The dollar amounts must be in \$100 increments. The maximum amount a recipient can receive for undergraduate, graduate, or professional study is \$8000 over a four-year period. A recipient of this assistance ~~is not eligible to receive the General State Scholarship but is~~ eligible for any other scholarships offered by the Office of Student Financial Assistance.

D. APPLICATION PROCEDURES

Completion of the Free Application for Federal Student Aid (FAFSA) is required for the Senatorial Scholarship Program. Students are encouraged to apply by the March 1 deadline so that they may be considered for all State scholarships. However, all applications received by the federal processor by May 15 of each year may be considered for Senatorial scholarships. FAFSAs are available from financial aid offices at Maryland postsecondary institutions, high school guidance offices, public libraries or by contacting the Office of Student Financial Assistance.

Students are also required to take the Scholastic Aptitude Test (SAT) or American College Testing (ACT) test. The following categories of students are exempt from the testing requirement:

1. students who have graduated from high school at least five years prior to filing the FAFSA;

2. students attending an eligible institution who have completed one year of postsecondary education in good academic standing;
3. students accepted for admission at an eligible private career school; and
4. students planning to attend or attending a Maryland community college.

In addition to these requirements, each Senator may request additional information from each student in order to further assess a student's application. Students are encouraged to contact their Senator to determine if additional information is necessary.

E. SELECTION PROCEDURES

Each Senator is responsible for establishing a selection process for their scholarship applicants and to award his/her scholarships. According to the law governing this program, each Senator must consider the financial need of each applicant. The Senator is the final judge of each applicant's financial need.

The Office of Student Financial Assistance provides to each Senator an application information sheet for each applicant, student labels, and an applicant roster. These materials may be used by the Senator in determining who may be offered assistance.

1. Application

When the student completes and submits the Free Application for Federal Student Aid (FAFSA) to the U. S. Department of Education, the Central Processor enters all the student's information into its system and evaluates the student's eligibility for federal student aid programs. The Office of Student Financial Assistance receives this information for all Maryland residents, ~~who indicate permission on their application for this information to be released to the State agency.~~

Once the Office of Student Financial Assistance receives the information from the Central Processor, an application information sheet for each applicant is produced and sent to the student's Senator. The application information sheets are generally produced on a weekly basis.

2. Student Labels

In addition to providing an application information sheet for each student to the Senator, the Office of Student Financial Assistance also provides ~~two~~one sets of student mailing labels for each student.

3. Applicant Roster

Periodically during the application process and later during the academic year, each Senator will receive a document listing all the students in the Senator's legislative district that have filed a FAFSA. This document is called an Applicant Roster.

The Applicant Roster contains the following information:

- a. Student name, address, telephone number, sex, and marital status;
- b. Student social security number;
- c. Student's family contribution towards college;
- d. Student's expected remaining financial need;
- e. College code and the cost for attending that institution;
- f. Year in college and whether the student is planning to live with parents, on or off campus; and,
- g. ~~Awards for the prior academic year and a~~Any tentative awards for the current academic year.

The first applicant roster will be sent to each Senator at the end of April. This roster will list all students who have filed a FAFSA by the March 1 deadline. In June, each Senator will receive the second applicant roster. This ~~one-roster~~ will include students who applied after March 1 and by May 15 ~~on the roster~~.

If a Senator serves from a legislative district comprised of more than one county, the number of scholarship units shall be divided as equally as possible among qualified applicants from each county in the legislative district.

F. AWARDING PROCEDURES

Once a Senator has selected award recipients, the Senator shall notify the Office of Student Financial Assistance. The written notification must include student name, social security number, award amount, and name of school. Once this information is received, the Office of Student Financial Assistance officially notifies students of the award offer. Students are then required to sign and return the award letter to the Administration within three weeks or the award offer will be cancelled. Awards cancelled due to lack of response will be reinstated at the request of the ~~Senator~~student, if funds are still available.

G. PAYMENT

Payment is made directly to the institution the applicant is attending. At the beginning of each school term, institutions will be asked to review Billing Rosters provided by the Office of Student Financial Assistance to certify that the recipient is a Maryland resident and enrolled for the number of credits for which the award was given.

Upon receipt of the institution's certification, the Office of Student Financial Assistance will disburse the funds to the institution.

H. RENEWAL AND CONTINUATION

A Senatorial Scholarship award is automatically renewed on an annual basis for up to four years of full-time study or eight years of part-time study if the recipient:

1. remains enrolled on at least a part-time basis in an eligible Maryland or eligible out-of-state postsecondary institution; and,
2. continues to meet all other eligibility requirements.

If the recipient is attending an eligible private career school, the award may be held until the completion of the program as long as the student maintains the above conditions, and completes the program within the length of time specified by the institution.

Students enrolled in a terminal certificate program may hold the scholarship for two years if the student remains enrolled full-time and otherwise meets the conditions of the scholarship.

Once a student is selected as a recipient, no further application is necessary. However, if there are changes to the student's name, address, state of residence, institution of attendance, or enrollment status, it is the student's responsibility to inform the Office of Student Financial Assistance in writing of these changes.

Students who receive these awards as undergraduates who then become graduate students must reapply to the Senator in order to receive an award for graduate studies.

I. REVOCATION OF AWARD

An award will be revoked if any of the criteria stated in G. Payment and H. Renewal are not met, if the recipient makes any changes to name, address or any other information pertinent to the Senatorial Scholarship Program and fails to inform the Office of Student Financial Assistance in writing or if funds are no longer available.

J. APPEALS PROCEDURES

Appeals to decisions of ineligibility or revocation of an award are made to the Director of the Office of Student Financial Assistance. All appeals must:

1. be in writing;
2. be submitted within thirty (30) days of notice of ineligibility or cancellation of award; and,
3. detail reasons and/or circumstances that would justify reversal of the original decision.

The Director or designee will review each case in consultation with the Senator and issue a decision no later than sixty (60) days after receiving the appeal. All decisions of the Director or designee are final.

K. BUDGET FOR THE SENATORIAL SCHOLARSHIP PROGRAM

Each Senator will have an annual budget to fund renewals and new awards. Senators are required to award all funds by September 1 of each fiscal year. Senators may reaward scholarships awarded by September 1 which are later cancelled. If at the end of a fiscal year, a Senator has scholarship funds remaining from cancellations, those funds will be carried forward into the next fiscal year for the Senator to award.

If a Senator does not award all of their funds by September 1, the law requires the Office of Student Financial Assistance to award all remaining funds to students in the Senator's legislative district; ~~funds not awarded by September 1 cannot be carried forward into the next fiscal year.~~

Budgets for the remainder of the Senator's term are as follows:

Fiscal Year 1994	\$133,000 plus carry forward
Fiscal Year 1995 and thereafter	\$138,000 plus carry forward

L. NOTIFICATION OF SENATORIAL FUNDS BALANCE

Periodically during the academic year, each Senator will be notified of their scholarship funds balance. A schedule for notification of funds balances is established annually.

M. ANNUAL REPORTING OF SENATORIAL SCHOLARSHIP RECIPIENTS

Pursuant to the requirements of Section 18-407 of the Annotated Code of Maryland, Education Article, the Office of Student Financial Assistance must announce publicly the names of all recipients of a Senatorial Scholarship.

MARYLAND HIGHER EDUCATION COMMISSION
OFFICE OF STUDENT FINANCIAL ASSISTANCE

GUIDELINES
FOR THE
DELEGATE SCHOLARSHIP PROGRAM

APPROVED: JUNE 12, 1997
REVISED AND SUBMITTED: MAY 8, 2003

MARYLAND HIGHER EDUCATION COMMISSION
Office of Student Financial Assistance

Guidelines for the Delegate Scholarship Program

AUTHORITY

The Delegate Scholarship Program (Annotated Code of Maryland - Education Article Section 18-501) was enacted into law by the Maryland General Assembly in 1957 and was last amended in 1988. Under law (Annotated Code of Maryland - Education Article Section 18-204), the Maryland Higher Education Commission, in consultation with members of the Maryland House of Delegates, has the authority to establish regulations for the administration of this program.

A. PURPOSE

The Delegate Scholarship Program is designed so that Delegates in the Maryland General Assembly can provide financial assistance to full- and part-time students pursuing an undergraduate, graduate or professional education.

B. ELIGIBILITY

To be eligible for a Delegate Scholarship, the recipient must attend an eligible institution for a program of undergraduate, graduate or professional studies for the number of credit hours for which the award was made. An eligible institution is defined as public or private institution of higher education in Maryland that possesses a certificate of approval from the Maryland Higher Education Commission. Full-time is defined as 12 credit hours per semester for undergraduates and 9 credit hours per semester for graduate students. Part-time is defined as 6 to 11 credits per semester for undergraduates and 6 to 8 hours for graduate students. Part-time students must carry at least 6 semester hours each semester in a program leading to a degree.

A student may also attend a private career school that has the Commission's approval to operate and that is accredited by a national accrediting association approved by the United States Department of Education. Recipients may also attend a hospital nursing diploma school if the curriculum is approved by the Commission.

Applicants may also be eligible for assistance if they are going to school out-of-state and they are enrolling in a program which is not offered in Maryland. This is referred to as applying for unique major status.

1. Applicants who are attending an accredited under-graduate, graduate or professional institution out-of-state and believe that their program of study is not offered in Maryland must submit a request, in writing, to the Director of the Office of Student

Financial Assistance that their major be identified as one not offered in the State for the purposes of applying for the Delegate Scholarship program.

2. The letter should include the student's name, social security number, State legislative district and a copy of the relevant sections of the out-of-state institution's catalog. Once the letter is received, the Director will forward the request to the Division of Academic Affairs and a determination will be made. The Director will then notify the student of a decision within 45 days of receipt of the request.

C. METHODS OF AWARDING AND AWARD AMOUNT

Under the Delegate Scholarship Program, each member of the House of Delegates has a choice between two methods of awarding their scholarships. Method A awards recipients a scholarship in the amount of their tuition and mandatory fees. Method B awards recipients set dollar amounts. A choice between these methods must be made at the beginning of each four-year term. Once a choice is made, the method of awarding will remain in place until the beginning of the next term.

1. Method A

Under Method A, each Delegate has the equivalent of four, 4-year, full-time scholarships. These scholarship awards equal the actual tuition and mandatory fees charged to the recipient within the limits set forth below and can be awarded over the Delegate's four-year term, for either 1-, 2-, 3-, or 4-year periods. This can also be defined as 16 full-time one-year awards.

The amount of the assistance is as follows:

<u>College Type</u>	<u>Amount of Assistance</u>
Community College	Tuition and Mandatory Fees
Public Four-Year College/University	Undergraduate Tuition and Mandatory Fees <u>as outlined below.</u>
Private Two-Year or Four-Year College/University	Up to Undergraduate Tuition and Mandatory Fees for the same student <u>as outlined below.</u>
Out-of-State School	Up to Undergraduate Tuition and Mandatory Fees for the same student <u>as outlined below.</u>
All Graduate Programs	Up to Undergraduate Tuition and Mandatory Fees for the same student <u>as outlined below.</u>

A Delegate may award two part-time scholarships for each full-time scholarship available. A part-time Delegate Award may be renewed for a maximum of eight years. The student is required to enroll for at least six credits per semester but no more than eleven credits per semester.

The maximum tuition and mandatory fees at the four-year public institution of higher education within the University System of Maryland, other than the University of Maryland University College and the University of Maryland, Baltimore, with the highest annual expenses for a full-time resident undergraduate will be ~~based on the projected~~ education amount used to calculate the appropriation. Mid-term increases will only be awarded if sufficient funds are available in the Delegate program.

Under Method A, a recipient of a Delegate Scholarship may use the award for summer school. The recipient is required to contact the Office of Student Financial Assistance. The term of the full-time scholarship is then reduced by one-half year. The amount of assistance for summer school may not exceed one half the value of the award for the next academic year.

2. Method B

Under Method B, a Delegate has an annual budget in the amount of four-times the tuition and mandatory fees at the four-year public institution of higher education within the University System of Maryland, other than the University of Maryland University College and the University of Maryland, Baltimore, with the highest annual expenses for a full-time resident undergraduate. If a Delegate chooses this method, the minimum award must be \$200 for the academic year and the maximum is one-half of the Delegate's budget for that academic year. If, at the end of an award year, a Delegate has not spent all of their funds, the amount will carry over into the following year for awarding. ~~Balances do not carry forward at the end of a four-year term.~~

~~—A recipient of a Delegate Scholarship is not eligible to receive an Educational Excellence Award but is eligible for any other scholarships offered by the State Scholarship Administration.~~

D. APPLICATION AND SELECTION PROCEDURES

It is each Delegate's responsibility to establish an application and selection process for their applicants. The law governing the Delegate Scholarship Program states that recipients are selected on any basis that the Delegate considers appropriate. When students contact the Office of Student Financial Assistance, they are referred directly to their three Delegates for information about the Delegate Scholarship program.

E. AWARDING PROCEDURES

Once a Delegate has selected award recipients, the Delegate is required to notify the Office of Student Financial Assistance. The written notification must include student name, social security number, date of birth, address, award amount, name of school attending and enrollment status. The Office of Student Financial Assistance supplies appointment forms to each Delegate for this purpose. Once this information is received, the Office of Student Financial Assistance officially notifies students of the award offer. Students are then required to sign and return the award letter to the Administration within three weeks or the award offer will be cancelled. Awards cancelled due to lack of response will be reinstated upon written request provided that funds are available.

F. PAYMENT

Payment is made directly to the institution the applicant is attending. At the beginning of each school term, institutions will be asked to review billing rosters provided by the Office of Student Financial Assistance to certify that the recipient is a Maryland resident and enrolled for the number of credits for which the award was made.

Upon receipt of the institution's certification, the Office of Student Financial Assistance will disburse the amount to be credited to the student's account.

G. RENEWAL AND CONTINUATION

Recipients of a Delegate Scholarship award are not automatically renewed on an annual basis. Recipients must reapply to their delegate annually.

If there are changes to the student's name, address, institution of attendance, or enrollment status, it is the student's responsibility to inform the Office of Student Financial Assistance in writing of these changes.

H. REVOCATION OF AWARD

An award will be revoked if any of the criteria stated in F. -Payment and G. - Renewal are not met, or if the recipient makes any changes to name, address or any other information pertinent to the Delegate Scholarship Program and fails to inform the Office of Student Financial Assistance in writing.

I. APPEALS PROCEDURES

Appeals to decisions of ineligibility or revocation of an award are made to the Director of the Office of Student Financial Assistance. All appeals must:

1. be in writing;
2. be submitted within thirty (30) days of notice of ineligibility or cancellation of award; and

3. detail reasons and/or circumstances that would justify reversal of the original decision.

The Director or designee will review each case in consultation with the Delegate and issue a decision no later than forty-five (45) days after receiving the appeal. All decisions of the Director or designee are final.

J. NOTIFICATION OF DELEGATE FUNDS BALANCE

Periodically during the academic year, each Delegate will be notified of their scholarship funds balance, ~~through a document called the Applicant Roster. This roster lists all the applicants and recipients of State scholarships by legislative district. At the end of the roster is a summary of the amount of funds expended for each scholarship program including the Delegate Program. Also, an Applicant Roster will be sent to each delegate at the end of April. This Roster will list all students who have filed a need-based application by the March 1 deadline and award renewals. In June, delegates will receive a second Applicant Roster which will include every student who applied up to the date on the roster and those students receiving an award. Additional updated rosters may be sent periodically throughout the year. If a Delegate does not award all of their scholarship funds during the fiscal year, those funds will be carried forward into the following fiscal year, until the end of their term in office.~~

**MARYLAND HIGHER EDUCATION COMMISSION
MEETING DATES 2002-2003**

2002 August	Education Policy	10:00 a.m.	Wednesday – August 7
	Finance Policy	1:30 p.m.	Thursday – August 8
September	Finance Policy	9:00 am - 2:30 p.m.	Thursday – September 19
	Commission Meeting	1:00 p.m.	Wednesday – September 25
October	Education Policy	10:00 a.m.	Wednesday – October 9
	Governor's Higher Education Conference	8:00 am - 4:00 p.m.	Tuesday – October 15 Stamp Student Union University of Maryland, College Park
	Finance Policy	3:00 p.m.	Thursday – October 30
November	Commission Meeting	1:00 p.m.	Wednesday – November 13
December	Commission Retreat	8:00-5:00	Wednesday – December 11
2003 January	Education Policy	10:00 a.m.	Wednesday – January 15
February	Commission Meeting	1:00 p.m.	Wednesday – February 19
March	Education Policy	10:00 a.m.	Wednesday – March 12
	Finance Policy	1:30 p.m.	Thursday – March 13
April	Commission Meeting	1:00 p.m.	Wednesday – April 23
May	Education Policy	10:00 a.m.	Wednesday – May 7 University of Maryland University College, Adelphi, MD
	Finance Policy	1:30 p.m.	Thursday – May 8
	Commission Retreat	8:00-5:00	Wednesday – May 21
June	Commission Meeting	1:00 p.m.	Wednesday – June 18

Unless otherwise noted, all Commission, Education Policy, and Finance Policy meetings
will be held at:

**839 Bestgate Road, Suite 400
Annapolis MD 21401
www.mhec.state.md.us**

